READING BETWEEN THE LINES: SOCIAL CONTEXTUAL INFLUENCES ON THE PRODUCTION OF AND RESPONSE TO CHARITABLE APPEALS

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DEDICATION

To my mother, whose empathy taught me to embrace the complexities of the human condition. And to my husband, who encouraged me to seek answers to the questions that inevitability followed.

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Heather Ann O'Connor

READING BETWEEN THE LINES: SOCIAL CONTEXTUAL INFLUENCES ON THE PRODUCTION OF AND RESPONSE TO CHARITABLE APPEALS

This two-article, mixed-methods dissertation examines social contextual influences on donor and fundraiser behavior. It presents an extension of the Charitable Triad Model to conceptualize philanthropic behavior as a contextualized act informed by the social context shared among and between fundraisers, donors, beneficiaries, and organizations.

The first article extends research on how social identity shapes donor behavior. This work finds that people are more likely to donate when they share identities, experiences, or group affiliations with beneficiaries. However, donors make philanthropic decisions in the context of multiple—and sometimes incongruent—identities. How might this complexity affect philanthropic behavior? I apply an intersectional approach to consider donors holding two simultaneous yet seemingly incongruent social identities. Using interviews analyzed with grounded theory, I examine the philanthropic journey of twenty Catholic women who donate to pro-choice organizations and identify as pro-choice activists. I uncover a common process shared by the donors as they navigate their seemingly incompatible identities. Findings reveal implications for fundraisers seeking to understand donors and for organizations that address controversial causes.

The second article uses an experimental design with professional fundraisers to test how the presence of a teammate affects the performance of a common fundraising task, that of writing a charitable appeal letter. A large body of research in non-fundraising domains finds that working in a team versus alone can positively affect performance and

team members' satisfaction. Further, new research finds that fundraisers who feel like they fit with their environment have higher satisfaction and retention. However, no known research has examined the role of the social environment in fundraisers' crafting of charitable appeals. Using person-environment-fit theory, we randomly assign fundraisers to work in a team versus alone to examine how this affects their satisfaction with the task, as well as the content of the letter produced. Results suggest implications for the management of development teams.

Overall, this dissertation provides evidence-based insights to improve fundraising practice.

Sara Konrath, Ph.D., Chair

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CHAPTER 1. INTRODUCTION

This two-article, mixed-methods dissertation examines social contextual influences on both donor and fundraiser behavior. Social contextual factors refer to the elements of social norms, social information, and social identity that have been shown to influence philanthropic behavior. First, I use a grounded theory approach to examine how the social context of identity affects donors' decisions to donate (Paper 1). Then I use an experiment combined with content analysis to study whether social contextual factors of the work environment affect fundraisers' writing of charitable appeals (Paper 2). In this chapter, I review the literature on the third sector, focusing on research into philanthropic behavior through the lens of the Charitable Triad Model. I then present the purpose, significance, and design of each study.

Background

Philanthropy is an inherently social endeavor. It is defined broadly to include tangible gifts of monetary or in-kind donations as well as volunteer time. Payton and Moody (2008) defined philanthropy as "voluntary action for the public good" (p. 6) that should be seen as a "multiplicity" encompassing voluntary giving, voluntary service, and voluntary association. This dissertation considers philanthropy primarily in the context of monetary donations (Papers 1 and 2) but also incorporates volunteerism and activism (Paper 1).

Individual donors are crucial to the U.S. nonprofit sector. In 2019, donors in the United States contributed over $449 billion to 1.6 million nonprofit organizations (Giving USA, 2020). Approximately 70% of these gifts were donations made by individuals.

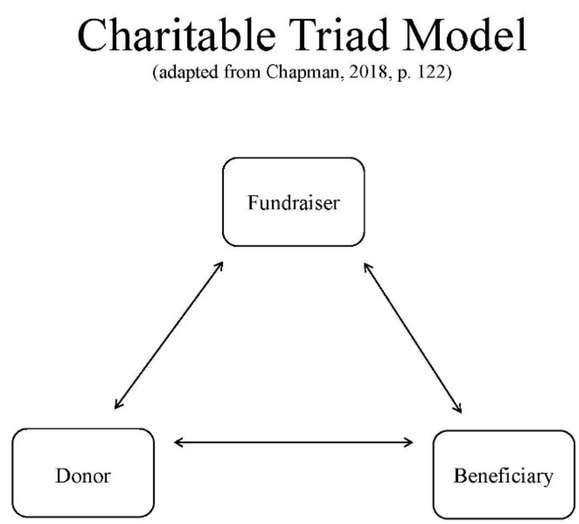
More than 50% of U.S. households donated to charity in 2019. Historically, annual charitable giving in the U.S. has equaled roughly 2% of GDP (Giving USA, 2020).

The inspiring amount donated by individuals in 2019 was in large part due to the work of an estimated 176,000 full-time fundraisers (Bureau of Labor Statistics, 2020; Giving USA, 2020). Recent research has shown that today's fundraisers are overwhelmingly female (over 73.1%) and are mostly under 40 years old (Nathan & Tempel, 2017). Fundraisers work in all subsectors, though education and health are the more prominent ones, likely due to their larger endowments and staff. Fifty-one percent of today's fundraisers have an advanced degree, which is not surprising given the rapid increase in philanthropy and nonprofit academic programs in the United States (Mirabella, 2007). Most, however, report learning their craft on the job or through the support of peers (Nathan & Tempel, 2017).

The Charitable Triad Model

While individual donors and fundraisers are integral to charitable giving, they alone do not encompass the entire philanthropic process. The Charitable Triad Model (Chapman, 2019) conceptualizes philanthropic action as a social process between donors, fundraisers, and beneficiaries. It suggests that giving money to nonprofits necessarily involves several stakeholders, including donors, fundraisers, and beneficiaries. The intergroup dynamics and social contexts among these three actors affect charitable giving as a relational and contextualized act (Chapman, 2019). Donor behavior is influenced not just by the donor's individual characteristics but also by the characteristics of the beneficiary (i.e., what cause is being considered), fundraiser (i.e., who is asking for the donor to contribute to the cause), and social context (e.g., who else is giving). To fully understand philanthropic behavior, the entire charitable triad must be considered (see Figure 1; Chapman, 2019).

Figure 1. *Charitable Triad Model*



Relationships between donors and fundraisers, in particular, can strongly influence giving responses (Meer, 2011; Platow et al., 1999; Scharf & Smith, 2016). Prior research has shown that donors often give in response to being asked (Andreoni et al., 2017; Bryant et al., 2003; Wiepking, 2007) and that people donate more when approached by people they know well (Meer, 2011; Scharf & Smith, 2016).

Other donors also shape a potential donor's philanthropic behavior. Research has found that donors are more generous when their gifts are visible to others (Alpízar & Martinsson, 2013; Bereczkei et al., 2007; Bull & Gibson-Robinson, 1981; Reinstein & Riener, 2012; Satow, 1975; Soetevent, 2005) and when they know the amounts that other donors have given (Croson & Shang, 2008). One study found that callers responding to a public radio appeal made larger donations when they were told that a previous caller had given a larger gift (Croson et al., 2009). Other research has shown that donations can be influenced by the particular coins and dollars visible in a donation box (Martin & Randal, 2008) or previous donations listed on an online fundraising page (Smith et al., 2015).

The characteristics of those benefitting from the gift also shape the philanthropic process. Certain types of beneficiaries, such as those perceived to be socially valued and powerless are more likely to receive aid from donors (Small & Loewenstein, 2003; Zagefka & James, 2015). Prior research has demonstrated that increased need is also associated with increased giving (Bennett & Kottasz, 2000; Polonsky et al., 2002; van Leeuwen & Wiepking, 2013; Zagefka et al., 2012). Perceived worthiness of the beneficiary also influences giving, as those who are perceived to be responsible for their predicament are less likely to receive aid (Fong & Luttmer, 2011; Loseke & Fawcett, 1995; Rudolph et al., 2004; van Leeuwen & Wiepking, 2013).

All three actors—donors, fundraisers, and beneficiaries—are integral to the philanthropic process. This dissertation focuses on some social contextual factors that influence two of those actors—namely, donors and fundraisers. I explore these two groups separately in two different studies, and both studies also implicitly focus on the beneficiaries of the giving (Paper 1: women in need of reproductive healthcare; Paper 2: individuals in need of housing). In the following sections, I review the development of the nonprofit sector and then summarize extant research on donor, fundraiser, and recipient behavior that shapes the sector.

Development of the Third Sector

While the concept of philanthropy can be traced back to the ancient Greeks (Sulek, 2010), the American philanthropic sector is a much newer phenomenon. Modern American philanthropy, or scientific philanthropy, began in the latter third of the nineteenth century as rapid industrialization and urbanization rendered traditional almsgiving an inadequate solution to the growing population in poverty (Gross, 2002; Sealander, 2002). As advancements in production fostered new businesses with growing socioeconomic influence, many corporations established foundations and trusts coordinated by the new managerial elite. Many such thought leaders proposed that traditional philanthropy was not only inadequate but was also aggravating the current misery (Hall, 2001). Their solution was a "new philanthropy" that would advance society by helping "aspiring" individuals elevate and further themselves through public art, libraries, and recreation (Hall, 2001). These new ventures coincided with economic growth, and advancements in efficiency of production that fostered new wealth in business shaped the philanthropic philosophy. This new framework was marked by an expanding realm of foundation engagement as foundation priorities shifted from immediate human needs to the societal ideal as defined by a select few (Sealander, 2002).

Ideas about the roles of government and private philanthropy then shifted under the New Deal. Whereas Hoover had placed philanthropy at the center of the governing process, Roosevelt designed policies "to find coherent and systematic ways to confront the crisis on a national basis, and that was something only the Federal government could do" (Zunz, 2014, p. 113). While philanthropic dollars were often leveraged along with federal dollars, and some philanthropic entities had a role in establishing new social service agencies, philanthropy's role in society became largely secondary as government agencies, rather than philanthropic organizations, distributed funds (Zunz, 2014). Many foundations and critical philanthropists fostered new partnerships with state and federal agencies to implement programs (Hammack, 1998).

The federal government transferred many of its functions to the states in the decades after World War II, shifting many responsibilities back to the private sector. Federal reforms between 1935 and 1955 encouraged charitable giving by members of every economic class (Hammack, 2002; Zunz, 2014). The number of foundations established by high net worth individuals grew exponentially, while new vehicles of giving, such as community chests and payroll deduction, made philanthropy feasible for the middle class. By 1970, the federal government had become the largest single source of revenue for nonprofit organizations (Hall, 2001).

Most tax reforms are fueled by economic need, but several changes to the tax code in the mid-twentieth century had the secondary effect of supporting the growth of the American nonprofit sector. The Tax Reform Act of 1969 and the Filer Commission Report of 1975 were both influential in shaping the third sector in the United States (Anheier, 2014). The Tax Reform Act included tax implications affecting all nonprofits but targeted large foundations in particular. It distinguished private foundations from other tax-exempt organizations, required annual minimum disbursements, and increased prohibitions on lobbying. While foundation executives initially feared these reforms, many soon acknowledged that they had not been as damaging to the sector as anticipated (Brilliant, 2001). By clarifying the distinctions between foundations and corporations, the Act ushered in the second wave of professionalism of the third sector by defining the field and increasing the need for nonprofit professionals outside the corporate realm.

In 1975, the Filer Commission provided legitimacy to nonprofits as a distinct sector and documented their importance as employers and primary providers of social services and influence in social and political life. In its final report, the Commission made

19 recommendations, all within the areas of broadening the base of philanthropy, improving the philanthropic process, and establishing a permanent commission (Brilliant, 2001). The Filer Commission increased collaboration among various members of the new third sector. Larger foundations were motivated by fears of increased legislation, and smaller nonprofit organizations needed a substantial collective voice to address Congress, demonstrate relevance, and carve out a lasting place for the third sector in society. One legacy of the Commission is recognition of the need for greater diversity within philanthropic foundations. By supporting the Donee Group, the Commission aided newly emergent activist organizations in gaining greater visibility and a stronger collective identity that fueled the sector as we know it today (Brilliant, 2001).

As the sector developed, so, too, did the role of fundraisers. In the latter half of the twentieth century, the development role of larger organizations evolved from one performed by outside counsel to a management-level function carried out by a team of in-house professional fundraising staff (Harrah-Conforth & Borsos, 1991). Professional organizations further professionalized the field by offering means of shared legitimacy, training, and a common socialization into the field. The American Association of Fund Raising Counsel (AAFRC), founded in 1935, served as a vehicle through which the fundraising profession asserted itself with a common cause (Cutlip, 1990). It established a common set of professional standards, facilitated the sharing of ideas, and offered shelter from criticism (Cutlip, 1990). By 1964, the Association of Fundraising Professionals (AFP) had adopted a *Code of Ethical Principles* that represented "an important effort to bridge the gap between fundraising as a business (represented by earlier professional fundraising firms) and fundraising as a mission (in service of charitable organizations)" (Pribbenow, 1999, p. 214). These principles helped to foster a shared understanding among donors and fundraisers and deepen trust between the two parties. In the following sections, I summarize literature on the drivers of donor, fundraiser, and recipient behavior and consider them in the context of the charitable giving triad.

Donors

Philanthropic giving can be defined as either formal or informal. Informal giving refers to any assistance given directly to individuals—that is, not through a formal organization. Informal giving includes donating to charity cash boxes, making donations of food or clothing, or giving money directly to a homeless individual or non-household relatives. Formal giving includes any financial donation or volunteer work made directly to a charitable organization (Zhu & Knoke, 2010). This dissertation focuses primarily on those providing financial gifts to nonprofit organizations, though volunteering is noted in Paper 1 as a precursor and complement to financial giving.

Research into philanthropic motivations has been informed by studies in psychology, economics, and marketing. This research has identified a combination of intrinsic and extrinsic motivations that are shaped by the donor's internal drives as well as influences in their social environment. For example, Sargeant and Woodliffe (2007) identified motives for giving as stemming from altruism, empathy, emotions (e.g., sympathy, guilt, fear), social justice needs, prestige (i.e., seeking public recognition), and tax benefits. Similarly, in a review of more than 500 journal articles, Bekkers and Wiepking (2011) classified eight mechanisms that drive charitable giving: awareness of need (knowing donations are needed), solicitation (being asked), costs and benefits (pragmatic considerations, such as tax benefits and thank you gifts), altruism (caring about the charity's output or consequences for beneficiaries), reputation (considering the social consequences of giving a gift), psychological benefits (feeling good about oneself), values (acting out one's priorities in the world), and efficacy (whether or not the donation will make a difference). More recently, Konrath and Handy (2018) demonstrated that donors are motivated by six key factors: trust (confidence in the recipient charity to deliver services), altruism (concern about the well-being of others), social (caring about what is important to their loved ones), tax benefits (reducing the price of giving), egoism (any personal benefit, including feeling good, avoiding feeling bad, and looking good), and constraints (lack of dispensable funds for philanthropy).

Beyond individual motives, research has demonstrated that social context—including social norms, social information, and social identity—influences donor behavior. These aspects of the social context inform the dyadic relationships between fundraisers, donors, and beneficiaries in the Charitable Giving Triad (Chapman, 2019).

Social norms are collective perceptions of acceptable group conduct—behaviors that are common, valued, and accepted by others (Lapinski & Rimal, 2005). Such behaviors may vary across groups, organizations, and cultures, and they may shift over time. Descriptive norms describe how people actually behave; injunctive norms describe how individuals think they and others should behave (Arrow & Burns, 2004).

Social information, or information about others' decisions that influences one's own decisions, is another aspect of the social context that informs philanthropic behavior. In the context of charitable donations, social information has been studied by both economists (Andreoni, 2006; Vesterlund, 2006) and psychologists (Cialdini & Goldstein, 2004; Penner et al., 2005; Weber et al., 2004). This research has illustrated that providing social information, such as the identities of other donors and their gift amounts, can increase the effectiveness of philanthropic solicitation methods (e.g., Alpizar et al., 2008a, 2008b; Croson & Shang, 2008; Hysenbelli et al., 2013; Martin & Randal, 2008; Shang & Croson, 2009; van Teunenbroek, 2016; van Teunenbroek et al., 2020). Further, donors are more willing to give if they notice that other donors are similar, but not too similar, to themselves (Tian & Konrath, 2020). In contrast, some studies have reported no effects of social information (Catt & Benson, 1977; Kubo et al., 2018; Murphy et al., 2015; Shang & Croson, 2009). Other research has found that social information decreased, rather than increased, charitable giving (Croson & Shang, 2008; Meyer & Yang, 2016).

Social norms and social information are amplified by the person providing the information. Individuals generally prefer to follow the behavior of those with whom they identify, such as family and friends, or those who share similar attributes (Festinger, 1954). This is particularly influential for decision-making in circumstances in which there is a shared sense of social identification (i.e., shared identity) (Weber et al., 2004). This role of social identification explains how the donor's identity influences their philanthropic behavior. Donors often feel particularly compelled to help people with whom they identify (Schervish, 2005). Further, they are more willing to help beneficiaries who are presented as similar to themselves (Charnysh et al., 2015; Forehand et al., 2002; Levine & Thompson, 2004; Reed et al., 2007). Shared identities between donors and recipients foster a crucial empathic connection that informs philanthropic behavior (Ostrander & Schervish, 1990; Polletta & Jasper, 2001; Schervish & Havens, 2002).

Researchers have long recognized that individuals hold multiple identities simultaneously (Burke & Stets, 2009; Tajfel & Turner, 1986). Identity salience, an aspect of social identity theory, asserts that individuals possess several social identities that are arranged hierarchically (Burke, 1980; Burke & Stets, 2009). One identity will rise to the top of the hierarchy when it fits with a given context, and it will guide the individual's behavior while they suppress other identities. This is often done by favoring an in-group and degrading an out-group (Tajfel & Turner, 1986). The more salient or prominent the identity, the more likely it is to affect philanthropic behavior. Identity theorists argue that the key motivation for maintaining identity is self-esteem; that is, individuals try to maintain a positive image of self in comparison with others (Burke & Stets, 2009). Individuals may experience distress when their conception of self is no longer validated in interaction with others, a state known as cognitive dissonance (Monroe et al., 2000). If the salient attitudes that comprise identity are threatened in social interaction, dissonance arises between the self-image and social validation of that self-image. Consequently, individuals will attempt to change their attitudes or behavior to relieve the tension created by inconsistent thoughts or beliefs (Harmon-Jones, 2019).

Both gender and religious affiliation are identities known to be substantial motivators of philanthropic behavior. For instance, women are more likely than men to support women's and girl's causes (Mesch et al., 2016). In recent studies, donors to women's and girls' causes linked their giving to their own experiences as women—including facing gender disparities and gender discrimination—as well as to their desire to give their children equal opportunities (Dale et al., 2018; Dale & O’Connor, 2020). Women are also more likely than men to cite their political or philosophical beliefs as motivations for giving (Mesch et al., 2015). Thus, religious identity is another driver of philanthropic behavior. Research has shown that that religiously affiliated individuals are more likely than secular individuals to give to religious causes (e.g., Bekkers & Wiepking, 2011; C. Smith et al., 2008). Other studies have suggested that religious persons are generally more likely to give to all types of charity than their secular counterparts and that more frequent church attendance is associated with higher levels of engagement in charitable giving and higher amounts donated (Bekkers & Wiepking, 2011).

Gender and religion are just two among many potential social identities that donors hold. Some donors make philanthropic decisions in the context of incongruent identities, yet little is known about how such incongruence may affect philanthropic behavior. Paper 1 of this two-paper dissertation examines Catholic pro-choice activists as a case of two seemingly discrepant identities that affect philanthropic behavior.

Fundraisers

Just as donors are influenced by their social context, so, too, are fundraisers. The Association of Fundraising Professionals (AFP, 2020) defined a fundraiser as “a person, paid or volunteer, who plans, manages, or participates in raising assets and resources for an organization or cause.” Further, the AFP noted that a “professional fundraiser” is one who is paid for one’s work and is distinct from a commercial solicitor. This dissertation studies the approaches of professional fundraisers who represent pro-choice organizations

(Paper 1) and those who represent an organization that serves individuals experiencing homelessness (Paper 2).

Examining how fundraisers adapt their practice to the social context is important for understanding the profession of fundraising and what it can accomplish (Burlingame, 1997). To date, relatively little research has examined fundraisers as individuals, though interest in this area has grown in recent years (Alborough, 2017; Breeze, 2017; Hansen, 2020). Studies have focused on the current demographics of fundraisers (Nathan & Tempel, 2017), skills and traits common to successful fundraisers (Breeze, 2017), and how they learn their trade and find professional support (Nathan & Tempel, 2017).

A greater amount of practitioner and academic literature exists on strategies that fundraisers use to inspire donations. Successful fundraisers know how to elicit emotions when soliciting funds (Dean & Wood, 2017). They see themselves as mediators between the donors and beneficiaries (Alborough, 2017), and they work as trusted brokers who build the donors' confidence in the charities they represent (Breeze & Jollymore, 2017). Communication is central to the fundraising practice (Breeze, 2017; Ostrander & Schervish, 1990), and research suggests that individual fundraisers have a great deal of discretion in how they perform their activities, resulting in solicitations that are shaped by the type of donor and the skill level of the fundraiser (Breeze, 2017; Kelly, 1998; Okada, 2013).

One type of solicitation that has received significant attention in the literature is direct mail. Appeal letters sent through direct mail, which represent one of the most popular forms of fundraising solicitation, are written messages shaped by fundraisers to address different audiences (Eschenbacher, 2016; Nonprofit Research Collaborative, 2019). Appeal packages are designed to persuade the reader to open the letter, read it, and then act on it (Spears, 2002; Warwick, 2010). Some research has focused on all aspects of the package, including the outer envelope. In one study, packages with more graphics resulted in lower response rates and a lower average gift size. This may have been due to donor aversion to high fundraising costs (Bekkers & Crutzen, 2007).

More research has examined specific strategies and tactics used in appeal letters that influence donor responses. Fundraisers do not write in isolation; their appeals are written with their potential donor in mind, with the goal of persuasion (Prior, 2003; Spears, 2002). Prior research has shown that a fundraiser's perception of how donors' preferences would interact with the organization's beneficiaries (clients) affects how the letter is written (Hansen, 2020). For example, donors are more likely to help others who are similar to them or who live close to them (Baron & Szymanska, 2011). Successful fundraisers may aim to create a sense of closeness between the donor and recipient by highlighting the similarities, focusing on a single individual rather than a group abstractly described in text or images, and by fostering the perception of a relationship with one beneficiary (Froyum, 2018; Small, 2011). Fundraisers may also position the nonprofit organization, rather than the beneficiaries, as being in a relationship with donors by using phrases such as "like family" (James, 2017). This approach may be helpful in building a sense of shared goals between donors and organizations that influence charitable behavior. For example, a recent study found that providing updates on projects and programs led to increased donations by repeat donors. Such donors felt that they shared a burden and responsibility to support the project described and were more likely to donate when asked (Kamatham et al., 2021).

Research also indicates that people focus more attention when they have a personal interest in a situation (Johnson & Eagly, 1989) and that people are more likely to donate when they consider themselves likely to be personally affected by the situation described in an appeal letter (Cao, 2016). Encouraging the reader to imagine themselves in the position of the beneficiary can increase donation behavior as long as the perspective-taking is achieved sequentially. Asking donors to simultaneously take the perspectives of both the client and themselves as a potential donor is less effective possibly because the multiple perspectives are more challenging to process (Hung & Wyer, 2009).

The most important element of an appeal letter is “the ask”—the call to take a specific action. The ask may apply a positive frame, highlighting the positive results of making a donation, or it may use a negative frame, highlighting the negative effects of not taking action. The use of positive frames has been shown to generate a stronger positive affect in the reader (Shen & Bigsby, 2013). The combination of a positive frame and an emotional appeal has been found to be persuasive particularly when paired with the positive action of making a donation (Shen & Bigsby, 2013). Negative framing has been found to activate a sense of fear in the reader (Cao, 2016; Shen & Bigsby, 2013). One study found that when readers felt more susceptible to the circumstances experienced by those in need described in the appeal letter, negative frames were more effective than positive frames in increasing the intention to donate (Cao, 2016). However, another experiment indicated that using a frame combined with varying types of evidence of the need or the organization’s impact was key to donor persuasion. Evidence can be statistical or anecdotal, with the most common approach being an emotional client story

(Ritzenhein, 1998). A study showed that combining negative framing with statistical evidence increased donor response, but combining positive framing with anecdotal evidence produced stronger results. Further, pairing positive framing with statistical evidence, or negative framing with anecdotal evidence, resulted in reduced donor support (Das et al., 2008).

Many appeal letters offer evidence to justify why the reader should take action, such as the worthiness of the organization or the population served. Appeals that establish the trustworthiness and credibility of the organization can be highly motivating to potential donors (Goering et al., 2011). Such appeals make it easy to evaluate the quality of the organization and inspire confidence in the donor that their donation will be an effective expression of their altruism (Baron & Szymanska, 2011; Bekkers & Wiepking, 2010). Fundraisers often take care to select client narratives that readers will receive positively (Timmer, 2010) and present clients as being worthy of help in ways that activate the donors' personal values (Bekkers & Wiepking, 2010; Froyum, 2018).

Many fundraisers will craft their appeals to encourage readers to see themselves as generous donors. This may involve using adjectives such as "kind" or "prayerful," casting the reader in the role of "hero," or reminding them that giving will "reflect your values" (James, 2017; Ritzenhein, 1998). The effectiveness of this approach varies depending on how important it is to individual readers to think of themselves as a kind and generous person (Aquino et al., 2009).

Finally, another common aspect of appeal letters is highlighting benefits that a donor may receive as a result of giving, such as a small token gift item (Landry et al., 2012), entry into a lottery that may result in a large prize (Landry et al., 2006), or tax benefits (Eckel & Grossman, 2008). However, it is the emotional benefits of philanthropy that have been shown to play a substantial role in generating giving. Past research has demonstrated that giving to charity tends to make people happier, and happier people are more likely to give (Anik et al., 2009; Konrath, 2016). In fact, activating emotional processing in an appeal has been tied to a higher likelihood to donate more and larger gifts compared to deliberative processing (Dickert et al., 2011).

While much research has examined the elements of effective appeals, few studies have considered the social environment in which fundraisers craft those appeals. Some scholarship has considered fundraisers within their organizational context, exploring issues such as how job fit and perceived organizational support affect fundraiser tenure (Farwell et al., 2020; Haggerty, 2015). Paper 2 goes beyond this to consider the role of the work environment and how it shapes the subjective experience of writing an appeal letter as well as the letter produced. A large body of research has shown that working in a team, rather than alone, can positively affect outcomes, such as performance and team members' satisfaction (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000). However, little is known about the effects of teamwork on the formation of charitable appeals, an essential function of the fundraising process.

Beneficiaries

According to prior research, donors are more likely to help identifiable victims more than anonymous ones—that is, beneficiaries discussed in the abstract (Dickert et al., 2016; Genevsky et al., 2013; Jenni & Loewenstein, 1997; Kogut & Ritov, 2005; Lee & Feeley, 2016). In one study, for example, individuals were 78% more willing to donate to help a child who had been identified by their name, age, and photograph than an unidentified child (Kogut & Ritov, 2005). Other research supports that donors tend to be more generous to identifiable victims, giving up to twice as much to identified beneficiaries than to those described only through statistics (Small & Loewenstein, 2003; Small et al., 2007). A recent meta-analysis discovered that this effect was stronger when the victim was a single child suffering from poverty for which they were not responsible and was depicted in a photograph (Lee & Feeley, 2016). Further, donors tend to donate more to help beneficiaries who are identified as living near them (Erlandsson et al., 2017; James & Zagefka, 2017).

In fact, people tend to help individual beneficiaries more than groups. This phenomenon, referred to as psychic numbing, occurs when the needs of many victims overwhelm potential donors (Slovic, 2010). Consequently, donors tend to be more motivated to help a single person in need rather than attempt to alleviate the suffering of millions. However, some research suggests that psychic numbing can appear with victim groups as small as two. In one study, donors exhibited a desire to give less to help a pair of children than to help either child individually (Slovic, 2010). This phenomenon can be mitigated by presenting a victim group as a single entity, such as a family (R. W. Smith et al., 2013).

Connecting the Three Groups to Understand Charitable Giving

The argument underpinning the Charitable Triad Model (Chapman, 2019) is that the triad of donors, beneficiaries, and fundraisers influences philanthropic decisions. Each actor informs giving individually and in combination through their triadic, relational, and contextualized social environments. To better understand philanthropic behavior, these actors must be studied in relation to each other and to their wider social contexts rather than in isolation. This dissertation focuses on two of these three actors: donors (Paper 1) and fundraisers (Paper 2). It also indirectly examines the donor–recipient dyad and the fundraiser–donor dyad. Further, it captures the dynamics within two actor groups: donors' influence on other donors and fundraisers' influence on other fundraisers.

While this dissertation focuses explicitly on donors and fundraisers, beneficiaries are implicitly considered. In Paper 1, participants describe empathy for beneficiaries and prior experience as beneficiaries of free or reduced-cost reproductive healthcare as motivators for their donations to pro-choice organizations. In Paper 2, the participant fundraisers make decisions about how to present the challenges faced by individuals experiencing homelessness to elicit a donation response. Though not physically present when the donors and fundraisers make their decisions, beneficiaries influence the decisions about whether to give and how to frame the appeal.

Purpose and Research Questions

The purpose of this dissertation is to understand how social contextual factors shape both donor and fundraiser behavior. The two overall guiding questions are as follows: (1) How do social contextual influences shape how donors make charitable decisions? (2) What are the social contextual influences that shape how fundraisers produce charitable appeal messages?

Beyond these overarching questions, the first study investigates how the religious beliefs and practices of Catholic pro-choice donors and activists influence their philanthropic decision to support pro-choice organizations and how they navigate their two seemingly incongruent identities. The second study scrutinizes the effect of working as a team versus alone on fundraiser satisfaction and message formation.

Significance

A donor's identity influences their philanthropic behavior. Donors often feel particularly compelled to help people with whom they identify (Schervish, 2005). Further, the likelihood of giving is greater when the recipient's identity is a prominent facet of the donor's self-image (Forehand et al., 2002; Reed et al., 2007). A shared identity between the donor and recipient fosters a crucial empathic connection that informs philanthropic behavior (Ostrander & Schervish, 1990; Polletta & Jasper, 2001; Schervish & Havens, 2002).

Gender and religion are both sources of identity associated with philanthropic behavior, but these identities may generate conflicted feelings regarding charitable giving to controversial causes. To my knowledge, no prior research has examined how identity and belief intersect when one makes philanthropic decisions. The first study in this dissertation examines Catholic donors to pro-choice organizations as an example of donors holding two potentially conflicting identities that influence their philanthropic behavior. It refines existing theory on social identities by presenting a model that can be tested on new empirical cases of discrepant identities shaping philanthropic behavior. Further, by considering participants' journeys in the context of the Charitable Triad Model, this paper highlights the importance of donors' effects on other donors. Results offer insights for organizations seeking to better understand their individual donors.

The second study in this dissertation examines the social contextual influences of fundraisers crafting an appeal letter. The emerging literature on fundraisers provides knowledge of who they are, how they enter their field, and how they learn their craft (Breeze, 2017; Farwell et al., 2020; Nathan & Tempel, 2017). Less is known about how fundraisers carry out their work (Hansen, 2020; Okada, 2013) and how their social environment may influence their work. The study considers fundraisers in their organizational environment and specifically examines the effect of the presence or absence of a team in crafting a charitable appeal letter.

A large body of research has found that working in a team, as opposed to alone, can positively affect outcomes, such as performance and team members' satisfaction (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000). While some research has examined the dynamics of major gift teams in institutional advancement (Bennett, 2012; Sturgis, 2006), to my knowledge, no studies have applied an experimental design to examine the effects of team or solitary work on the annual fundraiser experience. This project is among the first to apply elements of occupational and organizational literature to fundraisers crafting a vehicle for annual fund solicitation. It tests the consensus in the organizational literature through an experimental design using real fundraisers.

Study Designs

To explore the decision-making processes of Catholic women who donate to pro-choice organizations, I conducted 20 semi-structured online interviews between June 2020 and January 2021. All participants were limited to members of Generation X (born 1965–1980) and Millennials (born 1981–1996) who identified as Catholic or regularly engaged in Catholic practices and had donated to a pro-choice organization in the prior two years. I analyzed the interviews using an inductive strategy and employed grounded theory techniques to conceptualize the qualitative data (Bryant & Charmaz, 2019; Charmaz, 2014). The analysis aimed to capture first-hand descriptions of the donors' progression from being raised as conservative, pro-life Catholics to becoming Catholic advocates for pro-choice causes. Data analysis began with the first interview and continued in an iterative and ongoing process.

To examine the effect of social context on fundraisers' writing of appeal letters, we conducted a between-subjects experiment with real fundraisers in partnership with the Fund Raising School. Participants were randomly assigned to either a team (N = 31 pairs: 62 total) or solo (N = 34) condition and were told to complete a fundraising task: drafting an appeal letter for a real human services organization that provides shelter and case management services to those experiencing homelessness. After completing the letter, participants filled out a survey that captured their level of experience, personality traits, and subjective experience of the process, among other items. Dependent variables included self-reported experiences of the fundraisers and word choices made in the appeal letters, operationalized by the Linguistic Inquiry and Word Count (LIWC) program.

Overview of the Dissertation

This dissertation is organized into four chapters. This chapter has introduced the Charitable Triad Model as a framework through which to consider the study of donors and fundraisers within the contexts of their individual, interpersonal, and organizational environments. It has presented the primary research questions and defined key concepts.

Chapter 2 applies social identity theory to explore the social contextual factors that influence the philanthropic decision-making journey of Catholic women who donate to pro-choice organizations. Chapter 3 considers fundraisers crafting a charitable appeal letter through the lens of person–environment fit theory. It asks how working alone or in pairs affects their subjective experiences and output. Chapter 4 summarizes the findings, then considers the implications for practice, and proposes directions for further research. Finally, if offers an extension of the Charitable Triad Model to capture the role of organizations and fundraisers as distinct actors guiding the philanthropic process.

CHAPTER 2. THE UNEXPECTED ACTIVIST: CATHOLIC WOMEN WHO DONATE TO PRO-CHOICE CAUSES

Introduction

A donor's identity influences their philanthropic behavior. Donors often feel particularly compelled to help people with whom they identify (Schervish, 2005). Further, the likelihood of giving is greater when the recipient's identity is a prominent facet of the donor's self-image (Forehand et al., 2002; Reed et al., 2007). A shared identity between the donor and recipient fosters a crucial empathic connection that informs philanthropic behavior (Ostrander & Schervish, 1990; Polletta & Jasper, 2001; Schervish & Havens, 2002).

Concern for a group with which one identifies often motivates support for nonprofit organizations (Garvey & Drezner, 2013; Kendell & Herring, 2001). Research on donors has revealed a desire to promote community in the context of their various identities, including LGBTQ+, gender, ethnicity, and college affiliation (Cabrales, 2013; Dale, 2016; Gasman & Bowman, 2011; Wagner, 2011).

The role of identity in philanthropic behavior is especially evident in research examining women's philanthropy. Women are more likely than men to support organizations that benefit women and girls, and their motivations can be understood in the context of their identity as women who are motivated to help other women (Dale et al., 2018). Donors to women's and girls' causes link their giving to their own experiences as women—including facing gender disparities and discrimination—as well as to their desire to give their children equal opportunities (Dale et al., 2018; Dale & O'Connor, 2020). Since many women's issues are contested social issues, it is essential to consider giving to causes in one of these areas in the context of political beliefs. Indeed, women are more likely than men to cite their political or philosophical beliefs as motivations for giving (Mesch et al., 2015).

Although women's identities and their experiences as women influence much of their giving to women's and girls' causes, gender is only part of women's experiences. Religious identity is also known to be a substantial motivator of philanthropic behavior. Research has shown that religiously affiliated individuals are more likely than secular individuals to give to religious causes (e.g., Bekkers & Wiepking, 2011; Lincoln et al., 2008). In fact, some studies have suggested that religious persons are more likely than their secular counterparts to give to charity in general and that more frequent church attendance is associated with higher levels of engagement in charitable giving and higher amounts donated (Bekkers & Wiepking, 2011; Brooks, 2003).

Gender and religion are both sources of identity associated with philanthropic behavior, but these identities may generate conflicted feelings regarding charitable giving to controversial causes. To my knowledge, no prior research has examined how the presence of two incongruent identities informs philanthropic behavior. This grounded theory study examined Catholic women donors to pro-choice organizations who identify as pro-choice activists as an example of donors holding two potentially conflicting identities that influence their philanthropic behavior.

Catholics and Abortion

While many religious denominations have established teachings against abortion, the Roman Catholic Church has long been considered a thought leader on this topic and has upheld a consistent doctrine regarding abortion for more than 100 years (Tentler, 2004). Further, Catholic groups were critical in establishing the pro-life movement and continue to serve as prominent orchestrators of pro-life activities (Miller, 2014a, 2014b; Tentler, 2004; Williams, 2015). Owing to this longstanding and absolute position against abortion in all circumstances, the present study focused on those who self-identify as Catholic and/or engage in Catholic practices regularly and have donated to a pro-choice organization. Research has shown that despite Church teachings, Catholic women have abortions at a rate comparable to women in the general population. In recent survey studies, 24% of abortion patients identified as Catholic (Jerman et al., 2016; Jones & Jerman, 2017). In another study, just over a third (35%) of Catholic women stated that opposing abortion is essential to what being Catholic means to them (Smith, 2015).

While other studies have examined how pro-choice Catholics explain their beliefs (e.g., Miller, 2014a; Tentler, 2004; Williams, 2015), none, to my knowledge, has examined the decision-making process in Catholics who go beyond stating pro-choice ideals by making charitable donations to pro-choice organizations. Philanthropy is a vehicle through which personal beliefs and values are put into action; it can suggest a commitment beyond simply verbalizing a position. The present study aimed to understand how the religious practices and beliefs of Catholic women influence their pro-choice philanthropy, and vice versa. Using interviews with 20 Catholic women identifying as pro-choice donors and activists, this grounded theory study explored how donors navigate their seemingly incongruent identities. The findings reveal a common process that participants underwent in their development from children raised in conservative, pro-life Catholic households to adults identifying as Catholic pro-choice donors and activists.

In the following sections, I review the social identity and cognitive dissonance theories that guided this research and then describe the study design and data collection and analysis methods. Next, I propose a theoretical framework through which to understand the donors' journeys. Finally, I offer implications for practice and future research.

Theoretical Framework

This study applied social identity theory in an intersectional approach considering the influences of two seemingly incongruent identities on philanthropic giving. A social identity is an individual's self-concept derived from membership in a relevant social group (Turner & Oakes, 1986). Thus, social identity theory defines the process of seeing the self in the context of a social group (Brewer & Gardner, 1996), and it predicts certain intergroup behaviors through perceived group status differences, the perceived legitimacy of those status differences, and the perceived ability to shift from one group to another (Tajfel & Turner, 1979; Turner, 1999).

The theory operates from the following assumptions: first, that individuals strive for a positive self-concept or self-esteem; second, that social groups are often associated with either positive or negative values, thus influencing the social identity of group members; and third, that evaluation of one's own social groups—that is, in-groups—is made through comparisons of the social values and behavior attributed to out-groups (Tajfel & Turner, 1979).

Multiple Identities Within the Self

Researchers have long recognized that individuals hold multiple identities simultaneously. Identity salience, an aspect of social identity theory, holds that people have several identities or understandings of themselves that are arranged hierarchically (Burke, 1980; Burke & Stets, 2009). One identity will rise to the top of the hierarchy when it fits with a given context, and it will guide behavior while suppressing other identities and engaging in in-group favoritism and out-group derogation (Tajfel & Turner, 1986). The more salient or prominent the identity, the more likely it is to affect philanthropic behavior.

Recently, scholars have moved beyond a single, salient identity and introduced the idea that two identities can be salient simultaneously. Several studies have explored processes through which one might hold two identities, where one identity is a shared, superordinate identity, such as national affiliation, and the other is a subgroup identity, such as race. These studies have shown that the shared group membership of a superordinate identity can ease intergroup conflict based on subgroup identities (Doosje et al., 2002; Gaertner et al., 1993; Hornsey & Hogg, 2000). Other research has focused on two social identities that alternate in contextual salience. For instance, some studies on biracial individuals and immigrants have examined people's identification with multiple social groups. These studies have demonstrated that as the situational salience of one's identities shifts, cognition, affect, and behavior also shift (Benet-Martinez, 2006; Briley et al., 2005; Phinney, 1989; Shih et al., 1999; Shih & Sanchez, 2005). Other studies have considered how a pair of identities may interact or be related, such as how Asian and American identities may be combined or integrated (Benet-Martinez & Haritatos, 2005). Some studies have illustrated that activating both identities simultaneously may lead to behavior that compromises the two (Blader, 2007; Ramarajan, 2014). These approaches all highlight the concept of multiple identities within the same self that may interact with each other while simultaneously guiding behavior in context.

As identity salience shifts, an individual's group membership might also shift. For example, over the course of an individual's life, they may change political affiliation, move to a new city, or quit smoking. During such transitions, the individual experiences changes in group membership from an in-group to a previous out-group (Roth et al., 2018).

Cognitive Dissonance

Cognitive dissonance theory (Festinger, 1957) explains the structure of social identity and stresses the relationship between identity and behavior. It provides a model of cognitive information processing that highlights the motivational basis of identity (Monroe et al., 2000). Cognitive dissonance refers to the psychological stress that occurs when an individual holds contradictory beliefs, ideas, or values and how that individual takes actions that counter one of these inconsistent ideals in order to relieve the psychological stress (Festinger, 1957; McGrath, 2017). Individuals experiencing cognitive dissonance tend to relieve their psychological discomfort by finding means of resolving the contradiction and achieving an equilibrium (Harmon-Jones & Mills, 1999). To do so, they may minimize the importance and attractiveness of the dissonant thought, amplify the importance of the preferred alternative, or incorporate the dissonant thought into their belief system (Festinger, 1957).

Identity theorists argue that the key motivation for maintaining identity is self-esteem; that is, individuals try to maintain a positive image of self in comparison with others (Burke & Stets, 2009). Cognitive dissonance theory has been applied widely in identity theory literature to examine cases where conceptions of self are no longer validated in interaction with others (Monroe et al., 2000). If the salient attitudes that comprise identity are threatened in social interaction, a dissonance arises between self-image and social validation of that self-image. This motivates individuals to change their attitudes or behavior to relieve the tension created by their inconsistent thoughts or beliefs (Harmon-Jones, 2019). As such, in instances where an individual's attitudes are highly salient, they may ignore or rationalize any conflicting thought in an effort to restore cognitive consistency (Monroe et al., 2000). Other attempts to restore consistency include manipulative cognitive procedures, such as social attribution and social comparison (Harmon-Jones, 2019).

Design and Method

This study aimed to provide a theoretical framework for determining the influence of incongruent identities on philanthropic behavior. It examined how Catholic women became pro-choice donors while maintaining their Catholic practice and identity. Using grounded theory methods, I examined how such donors have navigated their distinct—and seemingly oppositional—Catholic and pro-choice selves.

I used an inductive strategy to analyze the interviews and grounded theory techniques to conceptualize the qualitative data (Charmaz, 2014). Systematic and iterative grounded theory techniques are common tools for studying a group of individuals who share common behaviors, meanings, or experiences in response to a common psychosocial process or psychosocial problem (Cowles, 1988). Grounded theory enables researchers to understand a shared process and the stages within it. Further, it allows researchers to identify markers between these stages and track how individuals progress from one stage to the next (Charmaz, 2003, 2014).

The study focused on women in the United States who had been raised in Catholic households and exposed to traditional pro-life messages from their parishes and, when applicable, Catholic schools. Participants were limited to Generation X (born 1965–1980) and Millennials (born 1981–1996). Both generations came of age after the *Roe v. Wade* decision of 1973 and were raised in a society in which abortion was legal and available but controversial. In addition, women from these generations range in fertility levels, which may influence reproductive healthcare donations. Further, Gen Xers and Millennials are valuable populations for nonprofit organizations: they hold potential for becoming regular donors and/or volunteers for several decades; many are experiencing life events that prompt estate planning, making them potential planned gift donors; and research has illustrated that Gen Xers and Millennials of high net worth are approaching charity differently than their elders and are, thus, becoming the focus of organizations determined to thrive in the coming "impact revolution" (Goldseker & Moody, 2017).

Role of the Researcher

A key aspect of qualitative research is the researcher's own background and positionality in the research process. As qualitative research relies on the researcher as a key instrument in data collection, it is important for researchers to reflect on the biases that they bring to their research. Doing so involves examining the researcher's political, social, and cultural context and past experience with the phenomenon, considering how such experiences may affect the research (Creswell, 2013; Merriam, 2002; Patton, 2002).

For the purpose of this study, it was important to acknowledge my own Catholic upbringing and prior work with pro-choice organizations. This experience served to pique my interest in these research questions and made me aware of the context from which Catholic donors make their pro-choice philanthropic decisions. Therefore, I am an “insider,” as I have my own direct involvement and connection with the subject of this research and share a background with the participants. While a frequent critique of insider status is that it may threaten a researcher’s ability to offer a trustworthy interpretation of the data, an insider perspective also has the potential to increase validity, as participants may feel more comfortable describing their experiences to someone who shares similar characteristics (Rooney, 2005). Furthermore, a researcher’s closeness and familiarity with the group being studied may provide nuanced and unique insights (Chavez, 2015).

In recent years, more insider research has been undertaken with the assertion that it is not only valid and significant but, in some ways, more effective than outsider research (Chavez, 2015). Such work requires that insider researchers be aware of their own biases throughout the research process and be willing to verify or falsify their assumed interpretations (Rooney, 2005). They must reflect on how their roles and identities affect their process (Miller, 1997) and possess strong observational skills to differentiate what they know from what they see (Chavez, 2015). Finally, insider researchers must keep the insider relationship honest and transparent (Chavez, 2015; Rooney, 2005).

Therefore, as this study sought to broaden our understanding of Catholic women’s pro-choice philanthropy, I was open about my religious upbringing and pro-choice stance to enhance participants' willingness to participate and minimize the social distance between us. However, beyond briefly acknowledging these two aspects of myself, I withheld additional information about my personal philanthropy or religious views in order to allow participants to share their experiences without comparison or judgment.

Recruitment and Data Collection

After securing Institutional Review Board (IRB) approval, I contacted representatives from Catholics for Choice, Planned Parenthood, and the National Family Planning & Reproductive Health Association (NFPRHA), who distributed information about the study in a newsletter and across their social networks. Interested participants then contacted me to inquire about the study and confirm their eligibility. After conducting five initial interviews, I used snowball sampling to recruit other participants for more interviews. This method allowed me to interview women who would not be otherwise easily identified and to do so relatively quickly and in a cost-effective manner. However, such sampling is not representative and may lead to oversampling within a particular network. I address this in the Limitations section.

Between June 2020 and January 2021, I conducted 20 semi-structured interviews with women across the United States through video conferencing. Interviews ranged in length from 50 to 130 minutes and were recorded and transcribed verbatim. Every participant was assigned a pseudonym to preserve her privacy and encourage her to speak openly.

Sample

Most (14) participants self-identified as Catholic and attended Mass at least several times a year. Five participants self-identified as Catholic yet did not regularly attend Mass. One participant did not self-identify as Catholic, preferring the term "social Catholic," and regularly engaged in Catholic practices, including attending Mass once a month. All participants had made a financial donation to a pro-choice organization within the past two years, and three had also donated time to a pro-choice organization within the same period.

Most (12) participants were between the ages of 40 and 49 years. Fifteen had attended a Catholic elementary or middle school, six had attended a Catholic high school, and 11 had attended a Catholic college or university. Most (9) had a spouse who identified as Catholic. Sixty-five percent had children. See Table 1 for the full participant demographics.

Table 1. *Summary of Participant Demographics*

Participant Demographic		**n (%)**
Gender	Female	20 (100%)
Religion	"Catholic"	19 (95%)
	"Social Catholic"	1 (5%)
Age (years)	50–55	4 (20%)
	45–49	5 (25%)
	40–44	7 (35%)
	35–39	4 (20%)
Race/Ethnicity	White/Caucasian	17 (85%)
	Latinx	3 (15%)
	Other	0 (0%)
U.S. region	West	4 (20%)
	Midwest	9 (45%)
	Northeast	4 (20%)
	South	3 (15%)
Marital Status	Single/Never married	4 (20%)
	Married/Coupled	13 (65%)
	Divorced	3 (15%)
Partner's Religion	Catholic	9 (45%)
	Protestant	4 (20%)
	Muslim	1 (5%)
	No affiliation	1 (5%)
	N/A (not currently in a partnership)	5 (25%)
Children	None	7 (35%)
	1	6 (30%)
	2	5 (25%)
	3 or more	2 (10%)
Education	High school, some college	0 (0%)
	Bachelor's degree (BA/BS/AB)	14 (70%)
	Master's degree	6 (30%)
	Doctoral degree	0 (0%)
Employed	Full-time	17 (85%)
	Part-time	3 (15%)
Household Income	Under $30,000	0 (0%)
	$30,000–$49,999	1 (5%)
	$50,000–$69,999	1 (5%)
	$70,000–$89,999	5 (25%)
	$90,000–$109,999	3 (15%)
	$110,000–$150,000	6 (30%)
	Over $150,000	4 (20%)

Most (18) participants included pro-choice organizations among their top three philanthropic priorities. Table 2 lists the pro-choice organizations that participants have supported in the past two years. However, all participants described other causes that they regularly support, mostly in the human services, education, environment, and arts subsectors.

Table 2. *Participants' Pro-choice Giving*

Name of pro-choice organization noted by participants	**Number of participants who have donated within the past 2 years***
Planned Parenthood	18
Center for Reproductive Rights	13
NARAL Pro-choice America	11
National Network of Abortion Funds	10
National Abortion Federation	6
International Women's Health Coalition	5
National Institute for Reproductive Health	4
Sister Song	4
Catholics for Choice	2
URGE: Unite for Reproductive & Gender Equity	2
The Guttmacher Institute	1
Chicago Abortion Fund	1
Memphis Center for Reproductive Health	1
Religious Coalition for Reproductive Choice	1

*Includes national and/or regional or local chapters

Analysis

The analysis aimed to capture first-hand descriptions of donors' progression from being raised as conservative, pro-life Catholics to becoming Catholic advocates for pro-choice causes. The data analysis began with the first interview and continued in an iterative and ongoing process. This approach allowed me to add new lines of inquiry as needed, refine theoretical concepts, and test emerging findings (Charmaz, 2014). Early transcripts were coded line-by-line using Atlas.ti to create labels noting each piece of data. After completing five transcripts, I initiated a more focused coding, applying the more frequent previous codes to the remaining transcripts (Charmaz, 2014). I employed inductive codes originating directly from the data, using participants' own words and descriptions, rather than applying preset codes (Kvale, 2008). The proposed framework below emerged from this iterative process. It was continually revised as the process proceeded.

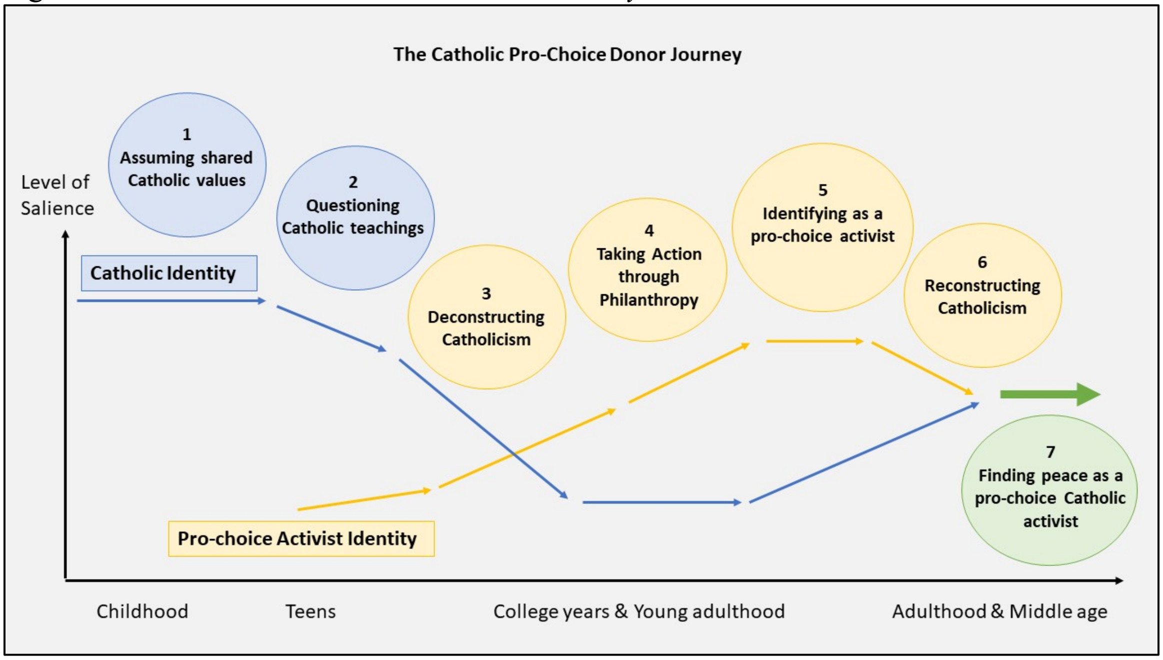
The line-by-line coding process reduces potential researcher bias, as all data are considered in the analysis (Charmaz, 2014). In addition, I kept ongoing field notes and an audit trail during data collection and analysis to document how research decisions were made (Esterberg, 2002; Yin, 2013). I also drafted memos for each interview, which allowed for more abstract analysis across the participants' experiences.

Results

Participants shared a common process for reconciling their Catholic and pro-choice selves, as illustrated in Figure 2. This process is characterized by seven distinct stages experienced from childhood to young adulthood and middle age. I refer to these stages as (1) Assuming shared Catholic values, (2) Questioning Catholic teachings, (3) Deconstructing Catholicism, (4) Taking action, (5) Identifying as a pro-choice activist, (6) Reconstructing Catholicism, and (7) Finding peace as a Catholic pro-choice activist. Though the participants experienced these stages in this order, they spent different amounts of time at each stage. For example, some questioned and deconstructed their Catholic values in the context of their widening life experience for over a decade, while some completed that stage by the end of their college years. This rate of progression through the stages was likely influenced by several factors, including depth of knowledge of Catholic doctrine and the presence of like-minded peers.

Figure 2 provides an overview of the above-described process. It illustrates how salient Catholic identity was in early life but then decreased rapidly as participants began embracing their emerging pro-choice donor/activist identity. By stage 7, both identities were salient, though at lower levels compared to earlier points in the journey. Next, I discuss the characteristics that define each stage and the progression from one stage to the next.

Figure 2. *The Catholic Pro-choice Donor Journey*



Stage 1: Assuming Shared Catholic Values (Childhood Through Early Teens)

During childhood and their early teens, the participants had a strong Catholic identity that was central to their social identity. All were raised Catholic and recalled being exposed to pro-life rhetoric in church or Catholic school even during childhood. While they did not understand the issue to which those terms referred, they described understanding that their family and Church community expected them to be pro-life. As Julie explained, “I never questioned it. I wasn’t even sure what pro-life really meant. I was because my family was. Plus, it just sounded nice. Who wouldn’t want to be pro-life? It sounds so happy and positive.”

Despite not understanding abortion, many recalled recognizing its importance in determining group inclusion and exclusion. For example, Amy described sensing value judgments placed on those who did not conform. She noted, “I knew I was pro-life, though I had no idea what that meant. I just knew that people who weren’t were somehow evil and scary.”

By assuming a shared pro-life value, participants enjoyed the security of conforming to their in-groups of Church and family. Many described it as a natural extension of being a member of the family. Caroline described being pro-life as something that "came with being part of the family, like a package deal. You're a (last name), so you're Irish, you're Catholic, you have your mom's red hair, your Dad's nose, and you're against abortion."

Stage 2: Questioning Catholic Teachings (Teens)

By the time participants reached their teens, all had experienced a transition in life that, as Meredith explained, "made the world bigger all of a sudden." These transitions included relocation to a new city or progressing to a middle- or high school that was larger and more diverse than their prior school. Participants were exposed to a broader variety of backgrounds and perspectives in their new classes and neighborhoods, and this exposure to greater diversity coincided with a period in which they began to question their Catholic teachings, which they frequently referred to as "the rules." They described a growing awareness of, and empathy for, those whom they feel were harshly judged or left behind by the rules. Theresa connected this realization to a particular friendship with a girl from a different faith:

> I got to thinking about how Jesus gets used as a weapon, a threat of like, "You're gonna go to hell unless XYZ." Like (my friend) is going to burn in hell because she doesn't believe the "right" things. No. Jesus was about hanging out with everyone and being a good role model and not judging and not being a jerk, so… I just didn't understand the judgment. I still don't.

By their late teens, the participants understood abortion and were beginning to consider the issue more fully. The majority either had become sexually active themselves or had friends who were. Four participants either had been sexually assaulted or knew of a peer who had been. During this stage, they described a disconnect between their Catholic teachings and experiences of people in their social circles. Cheryl's statement is illustrative:

> I began to think about how you hear about "good" abortions and "bad" abortions—that labeling around the circumstances. My abortion (at age 17) was always considered a "good" abortion because I was assaulted and I didn't have sex by my own choice. I was thinking about my friends who have had "bad" abortions, and in time, I think I just recognized that abortion isn't inherently good or bad. It doesn't make a person a "bad" person. It was a fact of life.

Elizabeth described feeling frustrated that "the rules" did not make sense in the real world. In addition, Amy explained,

> the pro-life people pretend that you can just give them a stern talking to, like, "Don't have sex and don't get pregnant," and then later, if they do get pregnant, "Oh well, it's a blessing from God." Well, I knew early on that if you're poor or if you want to finish school or if you have an abusive husband or boyfriend or whatever—no, it's not a blessing from God.

Forming an early political identity

As participants became involved with groups outside the Church and family, they also became interested in understanding differences between political parties. They described feeling that their Catholicism determined their political affiliation, and they resented political decisions being dictated to them. Evelyn explained this frustration well:

> It gets drilled into you before you're even old enough to vote: We're supposed to always vote for the pro-life candidate because the other makes you less Catholic; the other is wrong. But I didn't see how the government is who should be making that decision. I thought it should be her right and should be between her and God. I still do.

Each participant described an affiliation with Democrats as early as their teen years and expressed disdain for their newly identified out-group, Republicans. Their process of choosing this political affiliation was rooted in a desire to help those in need, and it provided a framework for articulating their evolving thoughts on abortion. Amy and Susan explained:

> So, this would have been like the end of Reagan, beginning of H. W. Bush, and I just started to hate the Republicans and the financial ways they were hurting poor people. That kind of clicked in my brain and where the disconnect happened, and also, I started being skeptical of everything, including the Church. (Amy)

> Democrats were and still are the ones who are like, "Hey, wait a second! Let's talk about the death penalty, that it's usually unfair." The Democrats are the ones who, overall, are looking at the value of life and quality of life and health and safety for the most people in general. So, I decided that they are the real pro-life party, and I didn't like being told that I'm not a "real" Catholic if I voted for one. (Susan)

Experiencing "otherness" amidst family and other Catholics

It was at this stage that participants described a growing sense that they were different from their family and Catholic peers. The reevaluation of their pro-life beliefs caused tension within the family and even attacks from strangers. This tension persisted throughout the following stages, but how they perceived and navigated it evolved. Jennifer described a common reaction from family when she began sharing that she was questioning pro-life ideology as a teen:

> I quickly learned I shouldn't talk about how I was feeling about my Catholicism with my family. My father shouted at me with disgust, my grandmother loudly prayed for the salvation of my soul, my mother said I was just going through a phase.

Kelly observed that some pro-choice Catholics who made their beliefs public were attacked even by strangers:

> these crazy old men on the internet, yelling at teenage girls writing blogs about being pro-choice, and it made me maybe kind of disheartened. It made me feel a little bit sick and embarrassed that somebody would group me in with them. I felt dirty for becoming part of that community willingly. That shame is gone now.

Kelly's mention of feeling "embarrassed" and "dirty" about adopting pro-choice beliefs illustrates a level of dissonance that began during this second stage. Many participants experienced psychological distress as they sensed a growing disconnect between their new pro-choice ideals and the pro-life expectations associated with their Catholic identity. This dissonance continued during the following stages yet reduced as participants constructed their own pro-choice Catholicism in the final stage.

Stage 3: Deconstructing Catholicism (College Years and Just After)

While participants began questioning their Catholicism during their teens, their cognitive and emotional efforts to navigate their pro-choice and Catholic identities intensified during their college years as they began to identify and articulate their personal values. Two elements were crucial for their meaning-making at this stage: support from relationships with like-minded Catholic women and knowledge of Catholic history and doctrine.

Support from other Catholic women

When participants wanted to express their pro-choice thoughts and feelings, they did so with caution, only approaching trusted friends and family members. Aunts were most frequently approached, although a few participants said that they were able to revisit the topic with their mother at this stage. Natalie noted how her mother began to evolve in her stance:

> My mom had a really interesting kind of emergence to social justice as Obama was elected. She shifted from being this Catholic woman who quietly believes in these things like reproductive justice to this Catholic woman who really recognizes them as issues. So, she started talking to me more about it.

Perhaps the most influential source of support was Catholic nuns whom participants met at their Catholic college or in other Catholic social circles. Participants viewed the sisters as compassionate, intelligent, and willing to listen and help them make sense of their thoughts and feelings. As Deborah noted, "a lot of Catholic women think that nuns are cool because they go and reach out to the community. They encounter every type of person imaginable, and they serve them all equally." Beth also explained her admiration: "When you think about it, [being a nun] is really the most badass, feminist thing you can do." The nuns who helped participants navigate this stage were outspoken Democrats, which signaled safety and potential shared values to participants seeking counsel. "She never tried to argue with me or change my mind," Melissa explained of the Sister of Mercy on whom she had leaned during this stage. "She knew the challenges of the poor better than me. She completely got my frustrations with pro-life rhetoric as hurting the poor. And she talked with me about individual conscience."

Study of Catholic history and doctrine

In addition to receiving support from other Catholic women, participants began reconstructing their idea of what their experience of Catholicism could be through the study of Catholic history and doctrine. Many participants relied on theological teachings from their Catholic college or conducted research on their own.

All participants characterized abortion as a relatively modern concern within the Catholic Church, noting that the Church's involvement in the pro-life movement began as recently as the Reagan administration. Several participants pointed out that abortion is not mentioned in the Bible and argued that the Church had changed its position on ensoulment—the point at which an unborn child possesses a soul—several times throughout its history. They pointed to new findings in gynecological research that they predict will force the Church to adjust its position on ensoulment again. Elaine's following comment is characteristic of this argument:

> So, science is now telling us that most of us have miscarried at some point in the first days and we're never even aware that we were pregnant. It just happens. It's just biology. The Catholic Church can't stick with the current idea of immediate ensoulment. No way. They can't say that God would let souls go so unceremoniously, like literally go down a toilet without anyone ever realizing they were there.

Another common refrain in interviews that echoed the arguments made during stage 2 is a sense that "the rules" did not match the teachings of Jesus. As Lauren said, "Jesus was compassionate and helped the poor. If Jesus were here now, he would have voted for Bernie [Sanders]!"

Others argued that the Catholic Church fails to embrace all lives at all stages. Emily summarized as follows:

> Abortion is not actually something that's really referenced and the Bible, and it's something that we've taken on as modern Catholics to be this huge issue. But as Catholics, we're supposed to be interested in life as a whole. We are talking so much about abortion but not recognizing that forcing women to have babies when they don't have the financial or emotional means is an issue of life. Migrant justice is an issue of life. The death penalty is an issue of life.

Finally, several participants characterized Catholic teachings on abortion as an ulterior motive designed to benefit the Church. Sharon explained, "It's all about making more Catholics. Because you don't have crusades anymore, there aren't natives to convert anymore."

Temporary reduction in Catholic practices

For the majority of participants (14), this stage was characterized by a temporary decrease in Mass attendance. Among them, eight stopped attending Mass altogether and three no longer identified as Catholic until their return to Mass at stage 6. Jennifer summarized this journey well:

> I was raised by Republican Catholics and sent to Catholic school. By college, I rejected it all for several years. I pushed it aside, and then as I got older, I decided there are parts of it that I can add that there's no reason for me to accept their views of absolutely everything. I can take what I want. I have my own conscience and my own relationship with God.

One participant, Erika, decided to no longer identify as Catholic at all, and this remains the case, though she still goes to Mass and says the rosary with the same, if not greater, frequency as other participants. As she explained, "I feel like taking the label means I agree with them on everything. And I don't."

Stage 4: Taking Action Through Philanthropy (During or Just After College)

Participants recalled making their first financial donation to a pro-choice organization late in their college years or while working in their first or second job after college. Not all initial donations to pro-choice organizations were financial. Three participants volunteered for an organization first and began to make financial donations later.

While participants had identified as pro-choice for some time, the motivation to take action through philanthropy was triggered by policy and political news they found alarming. Meredith described making her first donation "when the Republicans closed all but a few clinics in Texas a few years ago. That's when I said 'enough is enough.' It's just vindictiveness at this point." Susan recalled making her first donation in response to the 2016 presidential election. She said, "Trump got elected. Things got real serious real fast. I went online and made a donation that very night."

Giving in compassion

Rather than extending support for advocacy or lobbying, most participants made their first donation to support free clinical care for those who were unable to pay. Elaine voiced a common motivation when she said, “I liked that they help anyone, even if they don’t have insurance. Patients pay a small amount, or nothing, based on their income.”

Giving in gratitude

Many participants expressed gratitude and a desire to “give back” as a motivation for their philanthropy:

> I had used Planned Parenthood for my checkups and birth control when I wasn’t making much and had no insurance. My next job paid more, and I wanted to make sure to give back to support the next woman who needs it. I imagined me helping the next woman in line. (Deborah)

> I paid for my abortion and I left them a second check for as much as I could afford to give at that time. I had my life back. And, while I was there, I saw how much the staff have to put up with from protestors outside. I left the check and then sent the staff flowers the next day. (Kelly)

Giving as an act of healing

For some participants, their first donation to a pro-choice organization was part of the healing process after suffering sexual assault. Lauren’s experience is illustrative:

> After my experience in college, I had this revelation that I didn’t want to be angry anymore. I wanted to turn this anger into action. I sent an email to (organization) asking how to help, and they said, “We need a digital intern.” So, I got an unpaid internship with them and kind of started learning about the movement and about my place in it.

This stage marked the beginning of greater reflexivity. Participants took action after evaluating their values and considering them in the context of their Catholic teachings. By directing their gifts to offset the costs of free or reduced-fee clinical services, many participants felt they were performing, as Sharon explained, “the true pro-life act—helping those who can’t afford care elsewhere—and not judging them.” Jennifer shared a similar thought. She said, "I knew I was doing something others would consider very un-Catholic—supporting the enemy, literally—but how could helping women who are struggling financially not be a good thing?"

Stage 5: Identifying as a Pro-choice Donor and Activist (Early Adulthood)

After participants made their first donation to a pro-choice organization, they noticed, as Elaine explained, "the world didn't end. No bolt of lightning came down to punish me. I felt really good, actually. I had helped someone. I had stood up for what I believe." The recipient organizations began to send them more information on their programs and impact, and participants eagerly consumed the information. They began to research other pro-choice organizations, educate themselves about the breadth of the pro-choice movement, and became more deeply involved. At this stage, participants began considering themselves as "pro-choice activists," a term used repeatedly during the interviews.

Finding community in the pro-choice movement

Participants described gaining a sense of community as they became more involved in pro-choice issues. They found like-minded friends through fundraising events, talks at women's bookstores, online forums, and direct political action. Melissa's experience is characteristic of this stage:

> The Women's Marches just after Trump got elected were a big thing for me. It was amazing—energizing, you know?—to be in this massive crowd of women, so many of us, all chanting that we will not go back. I got more involved after that.

Identifying openly as a pro-choice donor and activist

Participants described using their philanthropy to assert their identity and presence in society. Erika shared, "I remember the day I put a Planned Parenthood sticker on my laptop. That was actually a big deal for me." Cheryl noted, "I was getting mail from NARAL to my house. There was no going back. I was standing up for what I believe, and even the mailman knew." Some participants likened this to an LGBTQ+ person openly sharing their identity: "I came out, in a way. This is who I am, what I believe, and I can be proud of that" (Kelly).

Broadening philanthropy to other causes

While most first donations to pro-choice organizations had been to offset the cost of direct services for those in need, participants at this stage added donations for lobbying and advocacy work. They began to support other pro-choice organizations (as shown in Table 2) in an effort to better embrace the breadth of the movement. "It's not just about abortion rights," explained Beth. "I see it now as a broader reproductive justice issue."

Their view of pro-choice advocacy as a social justice issue led them to support other social justice causes, such as criminal justice reform, healthcare reform, and the income gap. Amy explained, "Planned Parenthood was my first 'real' donation when I got my first full-time job after college. Next came ACLU, now Black Lives Matter. I guess Planned Parenthood was my 'liberal charity' gateway drug!"

Jennifer described her journey as follows:

> I started thinking more about the other side of choice, that if somebody chooses not to get an abortion and chooses to have a child, making sure that support is there, so they can have children in a healthy environment, be safe, and get paid fair wages to make that happen.

The participants' interest in politics had remained strong since their teens, and by this stage, they viewed their political activity as a form of philanthropy. Caroline offered a perspective that was frequently echoed in other interviews: "We have to have the right people in government to make a difference on a larger level. They'll fund social programs, make sure people have insurance, do something about police reform. Change won't come from charities alone."

Dissonance was still present at this stage as participants attempted to navigate their newfound community and their Catholic background. However, some participants did not see themselves reflected in the organizations' range of positions and activities:

> I think there were some moments I had this feeling of, I believe in this, but maybe I don't have to believe in it so militantly; maybe I can just support it more quietly. Maybe this is going too far. (Jennifer)

> There were moments where I kind of felt like maybe the organizations I'm supporting are going too far. I think that my views on abortion and the pro-choice movement have probably shifted. At first, I was like, "well I'm pro-choice, but I'm not pro-abortion." But recently, I think I've come around more to the idea of being pro-abortion even, which is interesting. (Julie)

Stage 6: Reconstructing Catholicism (Middle Adulthood)

While participants enjoyed the connections they made within the pro-choice movement, each one experienced a desire to either return to the Church (if applicable) or find ways of deepening their spiritual life within it. Participants tended to enter this stage after spending several years with their pro-choice selves as salient. Experiences commonly shared among women in their 30s and 40s—motherhood, losing parents, transitioning in their careers—all fueled this desire to make room for their Catholic selves.

Returning to or deepening faith

Beth, who had left the Church for about five years, decided that she would ignore the notion that as a pro-choice activist, she was no longer welcome in the Church. She said, "I realize that I missed it. I missed the Mass, the prayers, everything. And I decided that I wasn't going to let them take that away from me."

Others felt called to return to Mass after engaging in reading and reflection. Meredith explained, “I think part of the way I came back was through literature. I had been an English major back in college and still read about the saints in the medieval literature. It brought me into that part of it again, like through Catherine of Sienna.” Some participants found that their Catholicism deepened by providing solace after tragic events. “I’ve become more Catholic as I’ve gotten older,” Jessica explained. “After my assault and abortion, I found a surprising amount of comfort in my faith, and I have remained pretty Catholic.”

Altering behavior in Catholic contexts

This stage was characterized by concerted negotiation between private belief and public behavior. As participants had no intention of minimizing the values they had embraced in their pro-choice work, they altered their behavior to remain in the Church. They were, as Sharon put it, “doing Catholicism my way.”

For most participants, the first step was searching for a liberal parish. “I’ve looked, and sometimes, I’ll think I’m happy at a church, and then the priest will say something that will make me mad. Parish priests make me irritated more often than not.” Caroline repeated this frequently mentioned detail when she stated, “I drive past two other Catholic churches close to my house to go to a parish where I like the priest better.”

When participants were unable to attend a different parish, they found ways to avoid the potentially problematic part of the Mass: the homily. Melissa explained, “When this one particular priest does the homily… well, that’s my cue to leave. I’ll go to the bathroom or something. I don’t need to hear his sexist, homophobic, patriarchal stuff.” Meredith said she would strategically volunteer during the homily. “I’ll get up and prep the coffee and relieve the lady in the nursery during that time," she explained. "Then I can return for Liturgy of the Eucharist, and I feel like it's just God and me again." Kelly explained that with time and practice, she no longer avoids any aspect of the Mass: "Now, I can hear pro-life stuff in the homily, and I just kind of let it roll off my back."

Others found alternative ways of being engaged Catholics without attending Mass in person. "I'm much more likely to look for Catholic organizations to volunteer with than to go to church more often," Caroline said. Some participants turned to the internet to stay engaged on their own terms by listening to a live-streamed Mass or following thought leaders on social media. "For me, following Father James Martin on Twitter and reading his books is much more enriching than going to church," Natalie explained. Participants frequently mentioned more traditional forms of Catholic practice, such as using rosaries and prayer cards at home.

Finding like-minded Catholics

The drive to seek out like-minded Catholics in stage 3 continued in stage 6. All participants made other pro-choice Catholic friends. "We can't talk about it openly, but we find each other," Amy shared. Caroline repeated a frequently stated estimate that pro-choice Catholic women belong to most U.S. parishes: "Catholic women wouldn't say it outwardly, but I think a lot of them are pro-choice." She explained further:

> I've had good conversations with other Catholic people in my life. Most people I meet are more open to it than I would have thought. I read somewhere that like 98.9% of Catholic women are or have been on birth control at some point, so I'm wondering if abortion will be the next pill. Though I think it's going to take several decades.

Altering behavior in pro-choice contexts

While participants shared their pro-choice beliefs and philanthropy with a few other close Catholic friends, they were less likely to share their faith identity with friends from the pro-choice community. Further, several participants reported that they no longer read pro-choice appeal letters or emails because they find the language used in such appeals offensive. The following statements are illustrative:

> The language is written like it's "us" against "them," but I'm both. (Amy)
>
> I think it can get a little bit offensive and can push women away. As much as I don't want to moderate the voices of the pro-choice movement, I also think that you have to bend and reach and find as many people in this movement as we can. And I think that demonizing Republicans or people of faith gets to be a little bit much. (Julie)
>
> It gets to be polarizing. (Name of organization) talks in a way that doesn't help the organization, and it's shocking just for the sake of being shocking. (Theresa)

The dislike of polarizing rhetoric at this stage contrasts with earlier stages, when participants embraced and amplified differences between political parties. In embracing both their pro-choice and Catholic identities, they no longer welcomed the demonization of either out-group.

Stage 7: Finding Peace as a Pro-choice Catholic Activist

After spending time deepening or becoming reacquainted with their Catholic faith and reconstructing it on their own terms, participants described feeling more secure in the coexistence of their Catholic and pro-choice activist selves. As they became older, life events, such as motherhood, death of parents, or career changes, validated their stance. As Julie explained, "Being a mom has actually made me more pro-choice. I can't imagine doing this alone or with no money or delivering a baby into a world with no home. My Catholicism is about compassion."

Participants frequently highlighted compassion and social justice in describing how they lived their Catholic and pro-choice selves. Maria captured their logic succinctly when she said, "I think believing in the Catholic social teachings is what makes you Catholic." Cheryl tied her role as a mother to her lived Catholicism. "I hope I'm showing my girls to advocate for others and fight for social justice. That isn't incompatible with Catholicism in my mind," she said.

Navigating concern from family

Participants had begun navigating concern or disappointment from family members during their teen years, but at stage 7, they had a different reaction to this dynamic. Family members continued to voice their concerns directly or indirectly and would frequently characterize participants as not "real" Catholics. However, participants described it as the family member's issue, not theirs. The following quotation from Meredith is illustrative:

> My family still says I'm not a "real" Catholic, whatever that means. They can think what they want. My faith has deepened over the years. I'm secure in it. Other people can worry about who is "real" and who isn't all they want to.

Philanthropy as an expression of carefully considered personal values

As participants became more at ease with their integrated Catholic and pro-choice selves, philanthropy played an increasing role as an expression of personal values. By this stage, participants were donating to an increasing number of Catholic organizations, particularly those that provide basic needs or pursue social justice, while maintaining their regular donations to pro-choice causes. Sharon explained, "It's not one or the other.

I support both. They both speak to me. I support social justice, and that can come from some Catholic organizations and pro-choice organizations." Lauren echoed this reasoning: "I believe that we have a duty as Catholics to follow an idea of social justice and liberation for all people, and I think that abortion is part of that."

According to participants, Catholic and pro-choice organizations both support social justice but envision justice differently for some specific causes. Participants reported an aim to support organizations where the two overlap. For example, most reported researching Catholic funds carefully before donating because, as Amy said, "I want to support social justice like the way the Sisters of Mercy see it, but I also don't want to accidentally give money to any pro-life programs. You have to look at the organization really closely."

By this stage, participants were increasingly using their philanthropy as a vehicle to express their integrated identities. As Beth described, "I think that I am pro-choice because of my Catholic faith, not in spite of it. Part of my Catholicism is the idea of lifting up marginalized groups. So, I donate because of that. Women and people with reproducing bodies are involved with that."

Others noted expanding their philanthropy to encompass a broadening definition of valuing life. Kelly shared the following:

> I've been thinking a lot about Catholic interest in life and expanding that. I'm pro-choice because I think that making sure people who reproduce can have healthy lives and can choose when they become mothers is part of that idea of life. I make my donations from that.

Belonging to both but not fully identifying with either

By stage 7, participants no longer felt any tension in being Catholic pro-choice activists. However, they expressed feeling like they were not fully part of either the

Catholic or pro-choice community. Julie explained, “I would say I feel solid; I feel at peace, like I have a foot in both worlds, though I still don’t accept 100% of either one. And that’s okay.”

Anxiety about finding a comfortable place within the pro-choice movement was common not just among the participants but also among potential pro-choice supporters they knew. Caroline described this as follows:

> I know a lot of Catholic women who want to be involved with the pro-choice movement, but they feel like there’s not necessarily a place for them. They feel like it’s too radical or feel like they don’t have a space where they could feel comfortable with it, or they worry they’ll be pushed far beyond their beliefs and into something that they don’t believe in.

Cheryl echoed this sentiment by sharing that many pro-choice Catholics want to see safe, legal, and accessible abortion, but “there’s a line. No Catholic sees abortion as a good thing even if you want it available. If they think the pro-choice groups celebrate it, or use it willy-nilly, like instead of birth control, that’s a problem.” She continued by clarifying how she addresses this concern when communicating with other Catholic friends who are trying to find their place within the pro-choice movement: “I tell other Catholics that even if these organizations are almost too liberal for you or too progressive for you, you can still find use in them because abortion is an important thing to keep.”

Discussion

Prior research has shown that individuals hold multiple social identities within the same self-construct and changes in social context can trigger shifts in social identities over time. Such shifts can be profound and prompt a reorganization of the entire self-concept to integrate new identities (Amiot et al., 2007). This research extends previous work on social identity by examining the influence of seemingly incongruent identities on philanthropic behavior. This study considered, as a case of discrepant identities, how Catholic women who donate to pro-choice organizations navigate dissonance to reconcile the tenets of their faith with their philanthropic advocacy for reproductive health. I developed a model, grounded in the women's accounts, that illustrates a shared trajectory of their journey from conservative pro-life Catholic identities to integrated Catholic and pro-choice activist identities.

Participants shared a common process in navigating their conflicting beliefs from childhood to middle age. A common approach to addressing dissonance is to increase the attractiveness of the preferred alternative and decrease the attractiveness of the rejected alternative (Perloff, 2008). This effort to decrease the attractiveness of the currently perceived out-group may result in the out-group's degradation (Hogg, 1992). Participants adopted this approach early in their journey when they rejected Republicans and reduced their Catholic practices as their pro-choice identity increased in salience. This dynamic continued with their first donations to pro-choice organizations and their deepening involvement in the pro-choice movement. When they reached stage 7, where both identities had become salient, they expressed distaste for polarizing rhetoric that discredits either group.

As adults and into middle age, participants experienced a desire to, as Beth explained it, "make peace with" their Catholic upbringing. They discovered ways of adapting their behavior to return to Mass or otherwise deepen their religious practice without compromising their pro-choice values. Several participants also began to reconsider and redefine pro-life as a position that would support access to abortion as well as resources to support the health and well-being of new mothers and women planning to become pregnant. At this point, participants expressed less dissonance and more assurance that their two selves were not incompatible. Prior research has illustrated how activating two identities simultaneously may lead to behavior that compromises the two (Blader, 2007; Ramarajan, 2014). This may explain the participants' sense at stage 7 that despite identifying with both Catholicism and the pro-choice movement, they did not fully accept either one. Their Catholic and pro-choice identities were both salient, and they expressed a distaste for the very divisive rhetoric in which they had engaged during earlier stages.

The framework presented in this article supports past research arguing that individuals can create and hold cognitive and social space for multiple identities that change over time (Caza et al., 2018). Participants in this study held either their Catholic or pro-choice activist identity salient at different points in their journey. At stage 7, they described themselves as equally Catholic and pro-choice, yet they expressed feeling less fully included in either group. Participants altered their behavior in both contexts to remain true to their personal values. Their descriptions of the behavioral changes required to converge their identities relates to prior research arguing that holding two identities simultaneously may lead to behavior that compromises the two (Blader, 2007; Ramarajan, 2014). It may also be that rather than compromising either identity, participants found peace in prioritizing compassion and social justice. They experienced these values as being rooted in both their Catholic and pro-choice selves, allowing them to transcend any dissonance.

Findings support previous research asserting that Catholic identity is not simply a matter of voluntary association but that aspects of Catholic identity are experienced as involuntary (Dillon, 1999). Catholicism is “understood as a ‘birthright’ that can neither be given up nor taken away; it must be refashioned” (Dillon, 1999, p. 213). Participants in this study never fully eschewed their Catholic beliefs or practices but, rather, relied on their extensive knowledge of Catholic doctrine to find meaning in their emerging pro-choice beliefs and, later, reconstruct their personal experience of Catholicism that allowed room for those beliefs. They found like-minded peers who had also remained within the Church, thereby creating safety and support through an invisible in-group within an institution that, at times, felt like an out-group.

While identity can motivate philanthropic behavior to support one’s community, drivers of giving can be multiple and varied. Konrath and Handy (2018) created a self-report scale that captures six self-oriented and other-oriented motivations, including altruism, belonging in a social network, and egoism. Similarly, Bekkers and Wiepking (2010) identified and classified eight drivers of donating, including acting on one’s values, enhancing one’s reputation, becoming aware of a need, and deriving psychological benefits from giving. Each of these motivations was visible in the participants’ journeys. When making their first donation to a pro-choice organization at stage 4, participants supported funds that would help offset the costs of medical services for patients who were unable to pay. These gifts, fueled by altruism and awareness of need, were expressions of an emerging activist identity informed by compassion, which is central to the Catholic faith. Later, as they became more involved in the pro-choice movement, participants described using their philanthropy to become more visible and gain a greater sense of belonging within the movement. By stage 7, participants held both their Catholic and pro-choice selves as salient and identified each community as a chosen in-group. Their philanthropy was benefitting organizations in both communities, though they researched first to ensure that funds would not be spent on programs that would contradict either identity.

Limitations

Unlike quantitative studies, qualitative research does not seek to generalize to the larger population in the way one would if using a representative sample and generalizing based on probability theory. Instead, qualitative research finds value in capturing nuance that provides new insights and understandings (Merriam, 2002). Nevertheless, findings from this project serve to refine existing theory that can be tested in new empirical cases (Yin, 2013).

Finally, using snowball sampling for a portion of the recruitment resulted in some homogeneity within the sample. All participants were college educated and most were white with high philanthropic participation. Consequently, some perspectives and experiences may remain unexplored and unrepresented in this study's findings. Due to the high levels of formal Catholic education within the sample, it may also be that these participants are more familiar with concepts from Catholic tradition, and this knowledge validates any beliefs that dissent from papal authority. However, prior research on pro-choice Catholics has suggested that other dissenting Catholics similarly reinterpret Catholic teachings to navigate their beliefs (Dillon, 1999; Tentler, 2004).

Future Research

This study applied identity theory to examine donor behavior in the context of incongruent identities. This theory is traditionally used to explain situational, short-term shifts in identity salience triggered by contextual and environmental factors (Amiot et al., 2007). The proposed model points to specific contextual triggers that facilitate the transition from one stage to the next. However, the study also revealed long-term shifts in identity salience at two distinct points in the lifespan—namely, when entering early adulthood and when entering middle age—suggesting a need to further examine this trajectory from a developmental lens. Participants attributed meaning to events in their lives and examined or reexamined that meaning within the context of their evolving social identities, which suggests a developmental process.

Further research may compare these findings to other examples of seemingly conflicting donor identities, such as LQBTQ+ political conservatives, pro-business environmental donors, or political conservatives who support pro-immigration charities. Moreover, this study included participants from two generations—Generation X (born 1965–1980) and Millennials (born 1981–1996). However, one participant, Gina, who was not included in this analysis, was a 21-year-old member of Generation Z (born 1997–2012), and she progressed more quickly than those described in this article. Gina's atypical progression suggests a need for future research to examine differences among generations of pro-choice Catholics further.

Recent changes in American Catholicism offer more reasons to consider differences among more generations. In recent years, many parishes have increased the roles of women and girls, and the generations considered in this study were raised before such changes were embraced. For example, many U.S. parishes did not allow girls to serve as altar servers until after a change in canon law in 1983 or after more explicit authorization from the Vatican in 1994 (Code of Canon Law, 1983). Further, many U.S.

parishes may now integrate service and social justice more prominently into their education programs than this study's participants recall of their experiences.

Implications for Practice

Most individual donors hold multiple social identities that drive their philanthropic behavior, and some donors hold two or more identities that appear contradictory. Understanding this phenomenon can help organizations better frame their communications to address multiple audiences. This study examined the case of Catholic pro-choice donors as an example of donors holding seemingly incongruent identities. The participants are long-term donors to both pro-choice and Catholic causes or organizations.

Current practices in prospective donor evaluation tend to evaluate donors within the constraints of demographic data, such as religion. This study demonstrates the need to look beyond dichotomous data to capture nuances in a donor's multiple identities. Frontline fundraisers engaging in direct donor communication should be careful not to assume a donor's level of interest on the basis of one data point, such as religious affiliation. As this study's participants illustrate, such assumptions can exclude strong potential supporters. Organizations should keep the role of multiple identities and affiliations in mind and consider that prospective donors outside their traditional constituency circles might have a role and be welcomed.

Participants had a sense of being part of two seemingly disparate groups yet not fully belonging to either one. They further described trying to find where they belonged within their Catholic and pro-choice groups and noted that they perceived language as polarizing. One way of being more welcoming to donors outside the assumed constituency circle is by focusing on the language used in donor communications. A common refrain from donors in this study was displeasure in the framing of many pro-choice appeals, which they characterized as "offensive," "limiting," or "further polarizing" the population. Participants expressed feeling that appeal letters from organizations they often supported "attacked" groups to which they still belong. As Amy stated, "it's always written like it's 'us' versus 'them,' but I'm both." While language that highlights differences between in-groups and out-groups may galvanize support from repeat donors, a more inclusive approach may prove effective for reaching new potential donors.

This research offers two insights for the timing of charitable solicitations. First, participants described a period of reevaluating personal values at two stages of life: their college years and mid-life. Their evolving life experience influenced their perceptions and evaluations of various causes. This serves as a reminder that life events may provoke a former non-donor to reevaluate supporting a charitable organization. Likewise, life experience may turn a current donor away from an organization or cause. The process of identifying and retaining potential donors needs to be ongoing.

Second, participants' initial donations to pro-choice organizations were made largely in response to seeing advancing local or national policy initiatives that they found alarming. They described increased coverage of an issue and their social media outlets. Organizations should recognize the role of media coverage as a potential driver of philanthropic action and seize on times of increased news coverage as opportunities for charitable solicitation of potential new donors.

Finally, organizations may be more welcoming of those outside their assumed constituency circles by activating altruism and demonstrating need, where applicable. Most participants' initial donations were to help disadvantaged women. Helping those in need is a value that echoes across multiple religious and secular perspectives. As this study shows, it can serve as an attractive entry point for donors attempting to find their place within an organization.

CHAPTER 3. FUNDRAISER FIT: HOW TEAMWORK AND WORK PREFERENCE AFFECT THE WRITING OF APPEALS

Introduction

Philanthropy is crucial to the U.S. nonprofit sector. In 2019, donors contributed over $449 billion to nonprofit organizations, in part, through the work of an estimated 176,000 full-time fundraisers (Bureau of Labor Statistics, 2020; Giving USA, 2020). Yet, despite their integral role, fundraisers themselves remain largely understudied. Though scholarly work has provided information on fundraiser traits and demographics (Breeze, 2017; Duronio & Tempel, 1997; Nathan & Tempel, 2017), most fundraising research has focused on donor motivations and behavior (Bekkers & Wiepking, 2010; Goering et al., 2011; Konrath & Handy, 2018; Merchant et al., 2010).

This body of research has offered insights into how fundraisers might apply various strategies, such as emotion, personal narratives, or visuals, to improve the effectiveness of appeals for charitable giving (e.g., Das et al., 2008; De Bruyn & Prokopec, 2013; Dickert et al., 2011). However, limited research has explored the factors that influence how fundraisers craft their appeals (Hansen, 2020). Recent studies have suggested that they do so after considering both the needs of the organization they represent and their understanding of their donors' concerns (Alborough, 2017; Breeze, 2017). While new research has begun to explore how fundraisers may alter their approach according to the perceptions of the clients they serve, there has been little attention to how their messages shift in response to other situations (Hansen, 2020).

One situation that may influence charitable appeal framing is fundraisers' work environment. Research has found that a fundraiser's fit within the work environment affects aspects of their experience, including satisfaction and retention (Farwell et al., 2020). Specifically, the social aspects of work have been shown to affect turnover among nonprofit workers (Stater & Stater, 2019).

One aspect of social interaction at work is teamwork. Various types of teams—whether comprising staff, volunteers, or a mixture of both—are building blocks in most modern organizations (Hollenbeck et al., 2012). Teamwork is particularly important in fundraising. For example, 66% of fundraisers learn their profession through apprenticeship relationships with experienced mentors (Nathan & Tempel, 2017). While some research has examined the dynamics of major gift teams in institutional advancement (Bennett, 2012; Sturgis, 2006), to our knowledge, no studies have applied an experimental design to examine the effects of working in a team versus individually on fundraiser self-perception and performance.

Scholars have noted that given the nonprofit sector's reliance on charitable gifts and retention of staff to meet fundraising goals (Nonprofit Research Collaborative, 2015), topics related to fundraising management are a worthy avenue for further research (Bhati & Hansen, 2020). This article examines one aspect of fundraising staff management—team versus solo task completion—within the context of person–environment (P–E) fit theory. Using an experimental design with a common fundraising task (i.e., writing an appeal letter), we explored how working in a team versus alone affects a fundraiser's satisfaction with the task and the letter produced. We also asked whether these outcomes depend upon the fundraiser's preference for teamwork versus solo work.

Research Questions

Some research has evaluated the effectiveness of specific tactics used in the drafting of donor appeal letters (Bhati & Hansen, 2020; Hansen, 2020), however, little research has been conducted on how fundraisers choose their messages. Even less is known about how fundraisers' working conditions and preferences may affect how they shape their case for donating. This study examined how working in a team versus alone affects fundraisers' subjective experience of writing appeal letters for a nonprofit organization. We also investigated how teamwork, compared to working alone, affects linguistic elements of the actual appeal letter. Finally, we explored whether these results depend upon fundraisers' preference for working together or alone.

We next review the literature on the effects of working in teams (versus alone) on subjective and objective assessments, paying attention to whether this might depend upon the role of work style preference. We then review the research design and process, present the findings, and discuss implications for theory and practice.

Literature Review

Increasing reliance on team-based work structures has fueled a robust line of research (Devine et al., 1999; Turner, 2001). Teams are (1) two or more individuals who (2) socially interact (face-to-face or, increasingly, virtually); (3) possess one or more common goals; (4) are brought together to perform organizationally relevant tasks; (5) exhibit interdependencies related to workflow, goals, and outcomes; (6) have distinct roles and responsibilities; and (7) are together embedded in an encompassing organizational system with boundaries and linkages to a broader system context (Hollenbeck et al., 1995; Kozlowski & Bell, 2003; Salas et al., 1992).

The input–process–outcome (IPO) heuristic is a popular way of framing research on team effectiveness (Campion et al., 1993; Ilgen et al., 2005; Marks et al., 2001; Sundstrom, De Meuse, & Futrell, 1990). From this perspective, characteristics of a team's members, tools, and context (i.e., inputs) influence the team's effectiveness (i.e., outcomes). This influence happens indirectly through the team members' interdependent activities (i.e., processes; LePine et al., 2008). Teamwork processes have been found to influence each member's contributions but also to increase satisfaction with the team experience itself (LePine et al., 2008). The current study examined inputs (i.e., working together or not, preference for doing so), outcomes (i.e., fundraiser identification, perception of organization effectiveness, willingness to donate), and processes (i.e., elements of the appeal letters produced).

Effects of Teamwork

According to a large body of research, working in a team versus alone can positively affect outcomes, such as performance and team members' satisfaction (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000).

Subjective effects of teamwork

The current study assessed participants' subjective perceptions of teamwork, thus contributing to a large body of research. Teamwork processes are positively associated with team member satisfaction, cohesion, and potency (Hackman, 2002; LePine et al., 2008). Research suggests that when people work in cooperative groups, rather than individually, they work harder, help less experienced group members, and learn more (West, 2012). When experimentation, freedom, and innovation are predominant work team values, they can encourage and stimulate creativity and innovation through the cross-fertilization of ideas (Jaskyte et al., 2010). Furthermore, teamwork can increase flexibility and responsiveness to change (West, 2012).

A great deal of research has also found that working in teams can increase job satisfaction (Benrazavi & Silong, 2013; De Dreu & Weingart, 2003). Employees who work in teams report higher levels of involvement and commitment and lower stress levels than those who work alone (West, 2012).

Teamwork and objective work outputs

Meta-analyses have found that working in teams can lead to better quality work outputs (DeChurch & Mesmer-Magnus, 2010; LePine et al., 2008). Teamwork increases bonds between team members and motivation to complete tasks (Castaño et al., 2013; Chiocchio & Essiembre, 2009; Evans & Jarvis, 1980).

Evidence of negative impact of teams

Of course, researchers are aware that working in teams is not always beneficial. Some teams may experience challenges due to social loafing, where some group members coast instead of contributing to the group product (Albanese & Van Fleet, 1985; Kozlowski & Bell, 2003). Other teams may experience group conflict, which may divert attention and limit flexibility (Carnevale & Probst, 1998; Saavedra et al., 1993). Further, any resulting rifts can fracture teams, hindering performance and undermining team member satisfaction (Lau & Murnighan, 1998). Other research, however, suggests that a low level of conflict may be beneficial to the team process. Specifically, data suggest that a little team conflict can be stimulating and may help to minimize group-think, which is the tendency for groups to apply pressure to ensure consensus and conformity (Amason, 1996; Janis, 1972; Jehn, 1997).

The Role of Work Preferences

Despite the volume of research indicating the benefits of teamwork, not everyone prefers to work in a team. Since individual preferences for working in a team or alone vary, the current study captured participants' preferred work style to consider in the context of P–E fit.

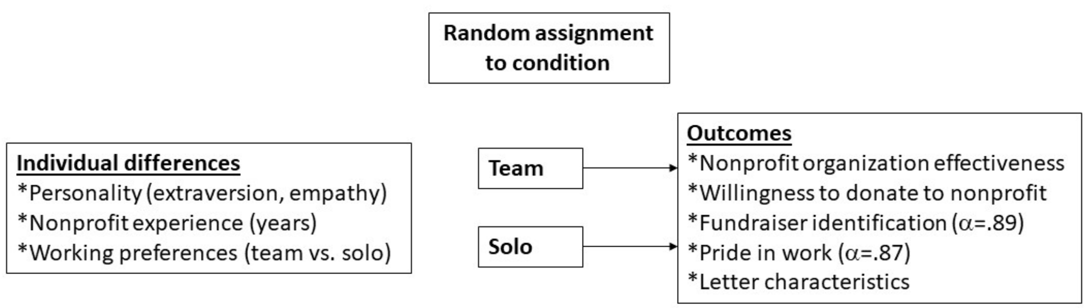
The P–E fit theory asserts that individuals not only influence their environment but that the environment affects the individuals (Kristof, 1996). Fit includes *individual factors*, such as personal interests, preferences, knowledge, skills, abilities, values, and goals. *Organizational factors* influencing fit include vocational norms, job demands, job characteristics, organizational culture and climate, and company or group goals (Kristof-Brown et al., 2005).

One type of fit, needs–supplies fit, is achieved when individuals' needs, interests, desires, or preferences are met by the jobs they perform. This is often achieved through resources such as pay, training, and opportunities for promotion (Boon & Biron, 2016; Muchinsky & Monahan, 1987). Needs–supplies fit has been prominent in several theories of adjustment, well-being, and satisfaction (Caplan, 1987; French et al., 1982; Kristof-Brown et al., 2005). This article considers one particular aspect of needs–supplies fit: *preference* for working on projects alone or with others.

The Current Study

Although, at times, teams may have the potential for conflict that could impede performance, most research has highlighted the potential benefits of working in teams (versus alone) on work quality, efficiency, learning, creativity, and member satisfaction. However, little is known about the effects of teamwork on the formation of charitable appeals, an essential function of the fundraising process. Several studies have examined the effectiveness of specific tactics used in charitable appeals, but very little research has explored how fundraisers actually craft appeal letters (Hansen, 2020). Thus, in the current study, we examined how writing an appeal letter with another fundraiser, versus alone, affects the fundraisers' perception of nonprofit organization effectiveness, their willingness to donate, identification as a fundraiser, pride in work, and linguistic elements of the letter (for an overview of the current study, see Figure 3). Participants were currently employed fundraising professionals to strengthen the study's real-life applicability.

Figure 3. *Overview of the Current Study*



In addition, individual preferences for work style may affect work output and team member experience. Therefore, we examined how the fit between fundraisers' work preferences and their assigned tasks (team versus alone) affects charitable appeal letter processes and outcomes.

On the basis of our literature review, we expected that working in a team, versus alone, would improve fundraisers' subjective experience of writing an appeal letter for a nonprofit organization. We also expected that working in a team, versus alone, would result in increased use of effective elements that research has found to relate to increased donations. Finally, we expected that a match between work type (team versus alone) and personal preference would be especially beneficial.

Method

Participants

We recruited practicing fundraisers to write an appeal letter for a homeless shelter in response to an identical prompt. The experiment was conducted with professional fundraisers through a partnership with The Fund Raising School (TFRS) at Indiana University Lilly Family School of Philanthropy between June 2017 and March 2018, after receiving IRB approval from the same university. Participants were recruited to participate in the study through verbal announcements made in TFRS courses a day prior to the scheduled studies. Each participant was paid $25 to thank them for their involvement in the project.

Participants were 97 professional fundraisers. One was excluded for following the instructions incorrectly. Of the remaining 96 participants, 71.9% were women, which mirrors national studies showing the gender breakdown of current fundraisers as 73–80% female (Feeley et al., 2016; Nathan & Tempel, 2017). Participants' fundraising experience ranged from less than a year to over 35 years (M = 7.17), with most (65%) having five years or less of fundraising experience. Participants also represented a range of organizational budget sizes: 21.7% worked at organizations with budgets under $500,000, 34.8% with budgets from $500,000 to $3,000,000, 20.7% with budgets from $3,000,000 to $10,000,000, 19% with budgets larger than $10,000,000, and 3.3% were unsure. Most participants worked in small- and mid-sized development departments; 57.4% reported having three or fewer full-time fundraisers on staff at their organization, and 88.3% had 10 or fewer full-time fundraisers on staff. The most common nonprofit subsectors represented were education (35.4%), human services (25.0%), religion (13.5%), and the environment and animals (11.5%).

Study Design

The study used a between-subjects experiment in which participants were randomly assigned to the team (31 pairs: N = 62 total) or solo (N = 34) condition.

Independent Variable

After providing consent, all participants completed a fundraising task: drafting an appeal letter for a real human services organization that provides shelter and case management services for families experiencing homelessness. Appeal letters are a crucial component of an organization's fundraising efforts, as they return financial support while developing a group of long-term donors (Nonprofit Research Collaborative, 2019; Seiler, 2016). Before drafting the letter, participants were given a one-page handout describing the organization's mission and programs. They were allotted up to 45 minutes to draft the appeal.

Participants were randomly assigned to write the appeal letter either alone (solo condition) or in teams of two strangers (team condition). The use of random assignment assured that the two treatment groups would be similar (Babbie, 2013), and this was verified prior to the analysis (see Table 1).

Dependent Measures

Dependent variables included the fundraisers' self-reported experiences and the word choices in the appeal letters, operationalized by the Linguistic Inquiry and Word count (LIWC) program (see Figure 1).

Part 1. Central Outcomes

Self-reported outcomes

Participants individually completed a printed survey (see Appendix E) that included individual differences and task-related questions. Individual differences included the Big Five personality traits (Costa & McCrae, 2008), years of experience as a fundraiser, work preferences (solo versus team), and empathic concern (Davis, 1983). Task-related questions included perceived effectiveness of the human services nonprofit organization and their willingness to donate to it (1 = not at all, 5 = completely). We also assessed their sense of identification as a fundraiser by asking three questions about their commitment to the field as a chosen profession: "I identify with fundraisers," "I feel committed to fundraising as a career," and "Being a fundraiser is a part of how I see myself" (1 = not at all, 5 = completely; α = .89). Finally, we assessed their pride in work with three questions: "I feel that potential donors will like the letter," "I feel a sense of pride in my/our letter," "I enjoyed writing this appeal letter today" (1 = not at all, 5 = completely; α = .87).

Appeal letter outcome variables

Computerized coding of participant letters. We used LIWC software to extract the percentage of text that referred to specific word groups, such as third person singular, or positive emotions (Pennebaker et al., 2003). LIWC generates 90 variables per text file

(Pennebaker et al., 2015). Among these are descriptive statistics (e.g., word count, words per sentence), linguistic dimensions (e.g., pronouns, verbs, articles), and word categories (e.g., affective processes, social processes). LIWC has been validated across dozens of psychological studies (Tausczik & Pennebaker, 2009).

In the current study, we specifically focused on the categories of affective processes, positive emotion, negative emotion, past focus, present focus, future focus, anxiety, family, first person singular, first person plural, second person, third person plural, home, male, female, affiliation, achievement, power, analytic, clout, authentic, as well as a customized category that we created, *worthy recipient*. See Appendix F for the list of words included. These particular categories were selected to try to capture words used by fundraisers to describe the clients and client experiences to potential donors. Research has found that fundraisers frame their messages differently depending on the level of perceived social stigma of the clients served (Hansen, 2020). The aim to communicate a cause that is both distinctive and socially acceptable influences fundraisers' choice of message (Okada, 2013).

Human coding of participant letters. We also developed a coding scheme for textual analysis in which we coded five dimensions: client narrative, data about clients or programs, data about the social problem or need, traumatic events, and gift impact. Client narrative was coded 2 if there was a clear client story that named the client, 1 if there was a client story that did not name the client, or 0 if a client story was absent or ambiguous. Data about clients and programs were coded 1 if such data were present or 0 if no such data were present. Data about the social problem or need were coded 1 if such data were present or 0 if no such data were present. The traumatic events dimension was coded 1 if reference to past trauma was present or 0 if no such reference was present. See Appendix G for the coding manual.

Part 2. Exploratory Outcomes

Computerized coding of actual nonprofit letters

This study used a real nonprofit human services organization in Indianapolis, Dayspring Center, and provided a short description of its programs, obtained from the organization's website. Dayspring Center also provided us with its five most recent appeal letters, which allowed us to compare language used by participants with language in actual letters that the organization had used for campaigns. We used the same LIWC categories as above and ran t-tests to examine similarities and differences between fundraiser participants in our study and fundraisers at the actual nonprofit (i.e., Dayspring Center).

Comparing fundraisers to the general public on empathy and perspective taking

We used the American National Election Studies (ANES, 2011) Panel Study to compare participants' levels of empathic concern and perspective taking. For our study, empathic concern and perspective taking were measured using a 1–7 scale rather than the 1–5 scale used by ANES. We transposed our study means to a 1–5 scale using the following equation: $Y = (B-A) * (x-a) / (b-a) + A$, where a is the former minimum, b is the former maximum, A is the new minimum, B is the new maximum, x is the current mean, and y is the new mean from the transposition.

Results

Random Assignment Check

Results of a random assignment check of baseline individual difference measures confirmed that participants' pre-existing individual differences were not significantly different by condition (see Table 3 for random assignment check and Table 4 for descriptive statistics).

Table 3. *Results of Random Assignment Check on Baseline Individual Difference Measures*

	Solo	**Team**	**Statistic**
Extraversion	5.11 (1.49)	5.59 (1.24)	$F(1,94) = 2.76$, $p = .10$
Empathic concern	4.13 (.65)	4.07 (.73)	$F(1,94) = 0.11$, $p = .74$
Perspective taking	3.78 (.64)	3.84 (.49)	$F(1,94) = .20$, $p = .65$
Years of experience	9.19 (8.69)	6.14 (6.42)	$F(1,94) = 3.73$, $p = .06$
Work preference (team vs solo)	52.08%	47.91%	$X(1) = 1.06$, $p = .30$

Table 4. *Descriptive Statistics*

Item	n	Participant Mean (SD)	Nonprofit Organization Mean* (SD)	t-test
Self-report outcomes				
Nonprofit organization effectiveness	96	5.73 (1.01)		
Willingness to donate	96	5.50 (1.35)		
Avg. fundraising identity (4 items; α = .89)	96	5.78 (1.15)		
Avg. pride in work (3 items; α = .87)	96	5.76 (1.15)		
Letter characteristics (LIWC)				
Affective processes *(happy, cried)*	94	5.40 (1.81)	7.52 (1.72)	**t(99) = −2.55, *p* = .01, d = 1.17**
Emotion				
Positive *(love, nice, sweet)*	94	4.30 (1.54)	6.23 (1.53)	**t(99) = −2.73, *p* = .007, d = 1.25**
Negative *(hurt, ugly, nasty)*	94	1.06 (.87)	1.23 (.42)	t(99) = −.43, *p* = .66, d = .20
Focus				
Past *(ago, did, talked)*	94	2.16 (1.52)	1.80 (1.29)	t(99) = .51, *p* = .60, d = .24
Present *(today, is, now)*	94	9.63 (1.59)	10.92 (1.45)	t(99) = −1.77, *p* = .07, d = .81
Future *(may, will, soon)*	94	1.21 (.83)	1.52 (.58)	t(99) = −.82, *p* = .41, d = .38
Anxiety *(worried, fearful)*	94	.18 (.29)	.25 (.26)	t(99) = −.52, *p* = .59, d = .24
Family *(daughter, dad, aunt)*	94	2.79 (1.00)	1.92 (1.21)	t(99) = 1.87, *p* = .06, d = .86
Point of View				
1st person singular *(I, me, mine)*	94	.78 (1.11)	.17 (.20)	t(99) = 1.22, *p* = .22, d = .56
1st person plural *(we, us, our)*	94	3.17 (1.64)	1.79 (1.05)	t(99) = 1.85, *p* = .06, d = .85
2nd person *(you, your)*	94	2.22 (1.34)	2.43 (.99)	t(99) = −.34, *p* = .73, d = .16
3rd person singular *(she, her, him)*	94	.78 (1.20)	.83 (.90)	t(99) = −.09, *p* = .92, d = .04
3rd person plural *(they, their)*	94	1.75 (1.92)	2.36 (.82)	t(99) = −.70, *p* = .48, d = .32
Home *(kitchen, landlord)*	94	3.78 (1.35)	1.50 (1.02)	**t(99) = 3.71, *p* = .0003, d = 1.70**
Worthy recipient *(worth, deserve)*	94	3.55 (1.16)	3.48 (1.27)	t(99) = .13, *p* = .89, d = .060
Gender				
Male *(boy, his, dad)*	94	.19 (.36)	.86 (1.08)	**t(99) = −3.53, *p* = .0006, d = 1.62**
Female *(girl, her, mom)*	94	.97 (1.34)	.54 (.67)	t(99) = .76, *p* = .48, d = .33
Affiliation *(ally, friend, social)*	94	8.48 (2.65)	5.44 (2.11)	**t(99) = 2.52, *p* = .01, d = 1.16**
Achievement *(win, success, better)*	94	2.27 (.86)	3.20 (1.50)	**t(99) = .01, *p* = .03, d = 1.04**
Power *(superior, bully)*	94	4.99 (1.51)	6.76 (3.19)	**t(99) = −.24, *p* = .02, d = 1.10**
Analytic	94	86.12 (8.20)	86.64 (5.96)	t(99) = −.14, *p* = .89, d = .064
Clout	94	96.08 (2.93)	95.22 (2.34)	t(99) = .64, *p* = .52, d = .30
Authentic	94	32.13 (16.35)	34.45 (14.35)	t(99) = −.31, *p* = .76, d = .14
Individual Differences			ANES**	

Item	n	Participant Mean (SD)	Nonprofit Organization Mean* (SD)	t-test
Extraversion	96	5.42 (1.33)		
Empathic concern	96	4.09 (.70)	3.83 (.73)	**t(2021) = 3.54, *p* = .0004, d = .37**
Perspective taking	96	3.81 (.54)	3.41 (.83)	**t(2021) = 4.67, *p* = .000003, d = .49**
Years of nonprofit experience	95	7.17 (7.36)		
Working preferences (% who prefer working in team)	93	.46		

*Based on five actual letters from Dayspring Center, the nonprofit organization used in this study

**Nationally representative sample

Data Analyses

To analyze the data, we ran 2 × 2 ANOVAs examining the effect of condition (solo or team condition) and work preference (prefers solo or team) on all variables.

Part 1. Main analyses

Main effects of condition.

Significant results. We found no significant effects of condition on any of the subjective outcomes, *p*s > .19 (see Table 5). However, condition did affect some of the language used in the appeal letter. Participants in the team condition were more likely to use words relating to home (M = 4.09, SD = 1.22) than those in the solo condition (M = 3.10, SD = 1.39), $F(1,87) = 10.59$, $p = .002$. They were also less likely to use male-related words (M = .12, SD = .21) than those in the solo condition (M = .33, SD = .53), $F(1,87) = 5.83$, $p = .02$. Finally, those in the team condition were more likely to use analytic words (M = 87.44, SD = 7.12) than those in the solo condition (M = 83.28, SD = 7.12), $F(1,87) = 6.03$, $p = .02$, d = .41.

Marginally significant results. Participants in the team condition (M = 9.51, SD = 1.57) were marginally less likely to use present-focused words than those in the solo condition (M = 10.1, SD = 1.58), $F(1,87) = 3.52$, $p = .06$. Those in the team condition were marginally less likely to use the first person singular (M = 0.63, SD = 1.04) than those in the solo condition (M = 1.10, SD = 1.21), $F(1,87) = 3.23$, $p = .08$.

Main effects of work preference.

Significant results. We found no significant effects of condition on any of the self-reported outcomes, *p*s > 0.08 (see Table 5).

Table 5. *Interaction Between Condition and Working Preference*

										Means (SD)			
										Prefers team		Prefers solo	
		Condition			**Work Preference**			**Interaction**		assigned team	assigned solo	assigned team	assigned solo
Variable	**df$_1$, df$_2$**	*F*	*p*	*d*	*F*	*p*	*d*	***F***	***p***				
Self-report outcomes													
Nonprofit organization effectiveness	1,89	0.24	0.63	0.08	.69	.41	15	.17	.68	--	--	--	--
Willingness to donate	1,89	1.7	0.20	0.36	1.89	.17	.23	1.89	.17	--	--	--	--
Fundraiser identification	1,89	1.79	0.19	0.31	.009		.01	.004	.95	--	--	--	--
Pride in work	1,89	0.94	0.33	0.18	.06	.81	.21	3.37	.07	6.1(1.15)	5.4(1.28)	5.6(1.19)	5.8(.99)
Letter characteristics (LIWC)													
Affective processes *(happy, cried)*	1,87	0.42	0.52	0.09	1.28	.26	.15	1.15	.29	--	--	--	--
Positive emotion *(love, nice, sweet)*	1,87	0.05	0.83	0.05	0.07	0.79	0.08	.04.	.85	--	--	--	--
Negative emotion *(hurt, ugly, nasty)*	1,87	2.3	0.13	0.21	2.74	0.1	0.12	**6.62**	**.01**	0.9(.76)	1.7(1.44)	1.1(.75)	0.9(.65)
Past focus *(ago, did, talked)*	1,87	0.03	0.87	0.02	0.05	0.82	0.15	1.04	.31	--	--	--	--
Present focus *(today, is, now)*	1,87	3.52	0.06	0.41	0.02	0.88	0.07	.50	.48	9.3(1.57)	10.2(2.08)	9.5(1.62)	9.95(1.29)
Future focus *(may, will, soon)*	1,87	1.4	0.24	0.28	0.11	0.74	0.13	.04	.85	--	--	--	--
Anxiety *(worried, fearful)*	1,87	0.85	0.36	0.2	0.001	0.98	0.07	.27	.61	--	--	--	--
Family *(daughter, dad, aunt)*	1,87	1.44	0.22	0.26	0.02	0.9	0.02	.14	.71	--	--	--	--
1st person singular *(I, me, mine)*	1,87	3.23	0.08	0.16	0.92	0.34	0.17	.99	.32	0.6(1.21)	0.8(1.41)	0.6(.87)	1.3(1.08)
1st person plural *(we, us, our)*	1,87	0.03	0.86	0.001	3.14	0.08	0.42	.06	.80	3.5(2.06)	3.5(1.91)	2.8(1.22)	2.9(1.19)
2nd person *(you, your)*	1,87	1.15	0.29	0.24	0.45	0.5	0.17	.001	.98	--	--	--	--
3rd person singular *(she, her, him)*	1,87	0.1	0.76	0.05	0.06	0.81	0.02	.10	.76	--	--	--	--

Variable	df_1, df_2	Condition			Work Preference			Interaction		Means (SD)			
										Prefers team		Prefers solo	
		F	*p*	*d*	*F*	*p*	*d*	***F***	***p***	assigned team	assigned solo	assigned team	assigned solo
3rd person plural *(they, their)*	1,87	0.75	0.39	0.19	1.5	0.22	0.33	.64	.43	--	--	--	--
Home *(kitchen, landlord)*	1,87	**10.59**	**0.002**	**0.73**	0.01	0.92	0.09	.18	.67	4.2(1.37)	3.1(1.44)	4.1(1.09)	3.2(1.36)
Worthy Recipient *(worth, deserve)*	1,87	1.96	0.17	0.35	0.29	0.6	0.09	.64	.43	--	--	--	--
Male *(boy, his, dad)*	1,87	5.83	0.02	0.47	0.07	0.8	0.18	.61	.44	.08(.20)	.34(.67)	.17(.23)	.30(.46)
Female *(girl, her, mom)*	1,87	0.007	0.93	0.0008	0.01	0.91	0.001	.08	.78	--	--	--	--
Affiliation *(ally, friend, social)*	1,87	0.67	0.42	0.22	1.46	0.23	0.32	.07	.80	--	--	--	--
Achievement *(win, success, better)*	1,87	0.63	0.43	0.2	0.17	0.68	0.1	.03	.60	--	--	--	--
Power *(superior, bully)*	1,87	1.03	0.31	0.27	0.05	0.81	0.01	1.16	.28	--	--	--	--
Analytic	1,87	**6.03**	**0.02**	**0.41**	1.87	0.18	0.01	**8.29**	**.005**	88.6(6.60)	79.2(10.87)	85.9(7.52)	86.7(7.12)
Clout	1,87	1.58	0.21	0.27	0.04	0.85	0.06	.02	.88	--	--	--	--
Authentic	1,87	1.43	0.24	0.13	**6.88**	**0.01**	**0.36**	**5.54**	**.02**	32.2(15.60)	19.3(13.16)	33.2(17.13)	37.4(15.24)
Letter characteristics (Human coding)										--	--	--	--
Client story	1,88	0.14	0.71	0.02	1.49	0.23	0.28	.03	.87	--	--	--	--
Data on people & programs	1,88	0.74	0.4	0.21	0.28	0.6	0.12	.17	.69	--	--	--	--
Data on need	1,88	0.001	1	0.02	0.45	0.51	0.04	1.89	.17	--	--	--	--
Trauma	1,88	0.05	0.82	0.06	0.85	0.36	0.2	.25	.62	--	--	--	--
Gift impact specific value	1,88	0.58	0.45	0.53	0.46	0.5	0.13	.07	.80	--	--	--	--
Gift impact abstract	1,88	0.68	0.41	0.19	0.02	0.89	0.02	.08	.78	--	--	--	--

Note. Means and SDs reported if main effect or interaction was marginal or significant. Marginal results are underlined, and significant results are in bold.

Marginally significant results. We found no marginally significant effects of condition on any of the self-reported outcomes, *p*s > 0.08 (see Table 5).

Interaction between condition and work preference. We next examined the interaction between condition and work preference. In the event of significant or marginal results, we ran a Fisher's least significant difference (LSD) post hoc test to determine which groups were significantly different from one another (see Figures 4, 5, and 6).

Figure 4. *Negative Emotion in Fundraising Letters*

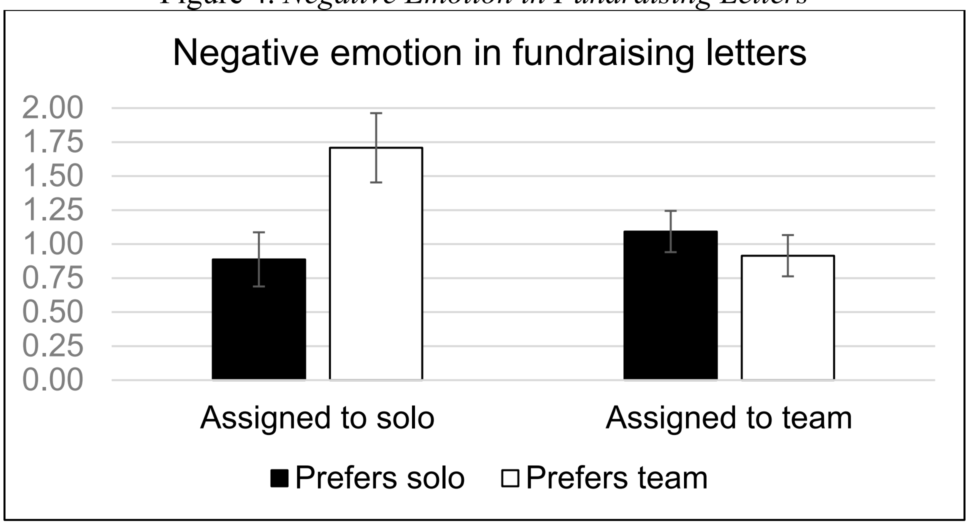


Figure 5. *Analytic Fundraising Letters*

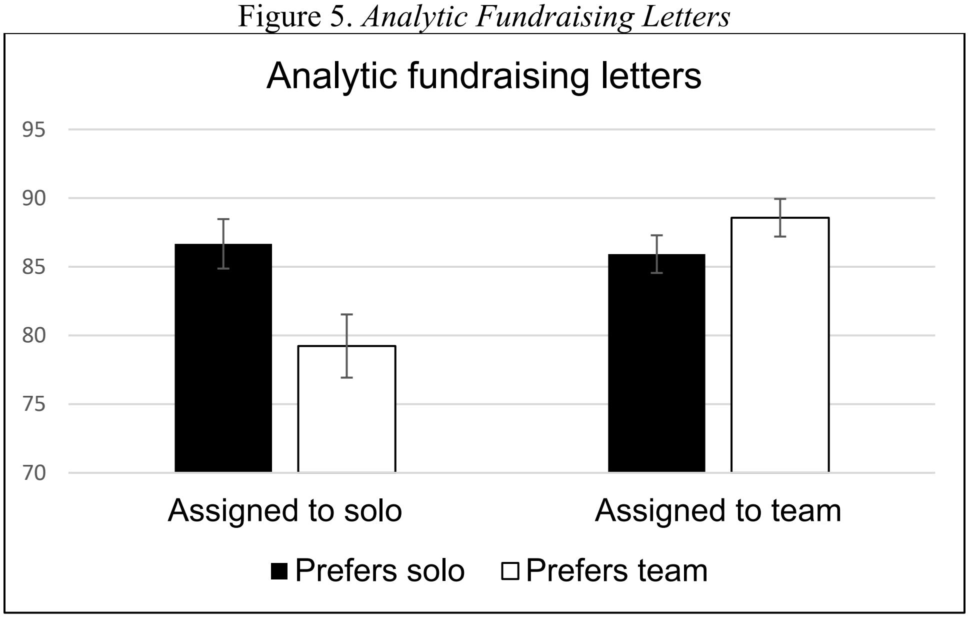
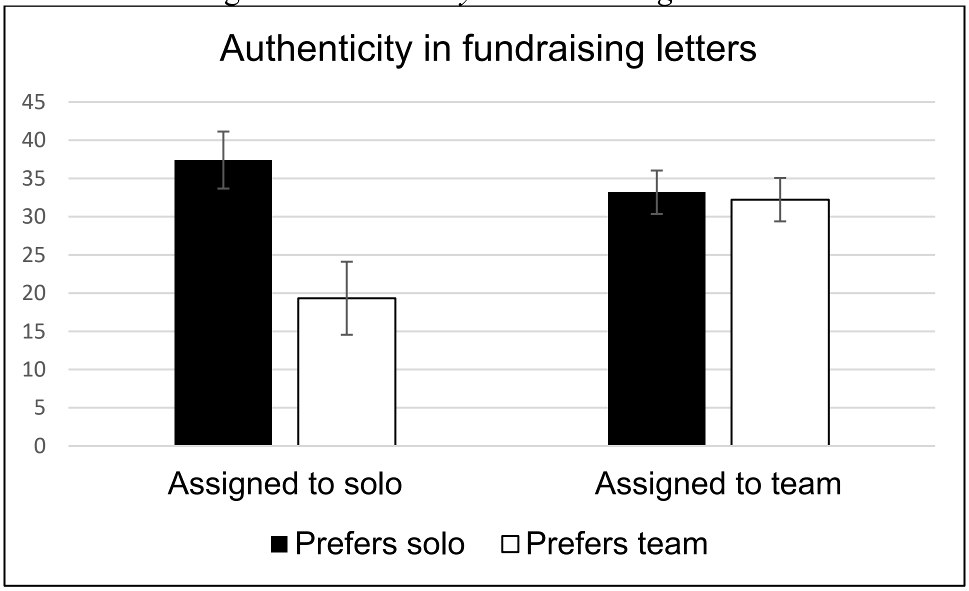


Figure 6. *Authenticity in Fundraising Letters*



Significant results. First, we found a significant interaction between condition and work preference on negative emotion, $F(1,87) = 6.62$, $p = .01$ (Figure 4). The LSD test indicated that appeal letters from participants who preferred working in a team but were assigned to work alone had significantly more negative emotion than letters from all three other groups, *p*s < .04 (see Table 4 for means and standard deviations).

We also found a significant interaction between condition and work preference on analytic writing, $F(1,87) = 8.29$, $p = .001$ (Figure 5). The LSD test revealed that letters from participants who preferred working in a team but were assigned to work alone were significantly more analytic in their writing style than all three other groups, *p*s < .04.

Finally, we found a significant interaction between condition and work preference on authentic writing, $F(1,87) = 5.54$, $p = .02$ (Figure 6). The LSD test showed that letters from participants who preferred working in a team yet were assigned to work alone were significantly less analytic in their writing styles than all three other groups, *p*s < .04.

Marginal results. Data revealed a marginal interaction between condition and work preference on pride in work, $F(1,89) = 3.37$, $p = .07$. The LSD test indicated that participants who preferred working in a team and were assigned to the team condition scored significantly higher in pride in work than all three other groups, *p*s < .04.

Part 2. Exploratory analyses

Computerized coding of actual nonprofit letters. We were also interested in how fundraisers in our study wrote letters compared to fundraisers from the actual nonprofit organization (Dayspring Center). As can be seen from Table 4, participants' letters contained fewer words related the affective processes ($M = 5.40$, $SD = 1.81$) than the Dayspring Center letters ($M = 7.52$, $SD = 1.72$), $t(99) = -2.55$, $p = .01$, $d = 1.17$. Participants' letters contained fewer words related to positive emotion ($M = 4.30$, $SD = 1.54$) than the Dayspring Center letters ($M = 6.23$, $SD = 1.53$), $t(99) = -2.73$, $p = .007$, $d = 1.25$. Participants' letters used more words related to home ($M = 3.78$, $SD = 1.35$) than the Dayspring Center letters ($M = 1.50$, $SD = 1.02$), $t(99) = 3.71$, $p = .0003$, $d = 1.70$. Participants' letters included fewer male-related words ($M = .19$, $SD = .36$) than the Dayspring Center letters ($M = .86$, $SD = 1.08$), $t(99) = -3.53$, $p = .0006$, $d = 1.62$. Participants' letters contained more words related to affiliation ($M = 8.48$, $SD = 2.65$) than the Dayspring Center letters ($M = 5.44$, $SD = 2.11$), $t(99) = 2.52$, $p = .01$, $d = 1.16$. Participants' letters contained fewer words related to achievement ($M = 2.27$, $SD = .86$) than the Dayspring letters ($M = 3.20$, $SD = 1.50$), $t(99) = .01$, $p = .03$, $d = 1.04$. Finally, participants' letters contained fewer words related to power ($M = 4.99$, $SD = 1.51$) than the Dayspring Center letters ($M = 6.76$, $SD = 3.19$), $t(99) = -.24$, $p = .02$, $d = 1.10$. To see results for all categories, see Table 4.

Comparing fundraisers to the U.S. general public on empathy. Next, we ran a t-test comparing empathic concern in our sample ($M = 4.09$, $SD = .70$) and the ANES sample (M = 3.83, SD = .733), t(2021) = 3.54, p = .0004, d = .37 and perspective taking in our sample (M = 3.81, SD = .54) and the ANES sample (M = 3.41, SD = .83), t(2021) = 4.67, p = .000003, d = .49. Our participants—all active professional fundraisers—scored higher than the general U.S. population in both empathic concern and perspective taking.

Discussion

We designed our study using a common theoretical model for understanding team effectiveness—namely, the IPO heuristic. In our design, we examined inputs (i.e., working together or not; preference for doing so), outcomes (i.e., fundraiser identification, perception of organization effectiveness, willingness to donate), and processes (i.e., elements of the composed appeal letters) to understand how working in a team or individually might affect fundraisers' experiences of drafting a charitable appeal and the appeal they produce. Despite extensive previous research noting the beneficial effects of teamwork (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000), our study showed no differences in the participants' subjective experiences or work output. This unexpected result raises questions as to why the team environment was not beneficial in this study. One partial explanation is that the study was underpowered to detect small effects; significant results were only found with Cohen's ds above .40, which is a small-to-medium effect size (d = .50 is medium). However, there may be other explanations for the limited effects of working in a team.

Second, it is possible that the fundraising profession and fundraisers themselves are unique. Our fundraiser participants scored higher than the general U.S. population in both empathic concern and perceptive taking. When fundraisers write alone, their higher perspective taking and empathic concern may help them hold potential donors in their minds. They may use these traits to imagine the potential donor and anticipate reactions, reducing any potential benefits of working in a team.

A third potential explanation for fundraisers not benefitting from teamwork in this study may be the task performed. Fundraisers may approach the process of writing a charitable appeal letter as formulaic, following a given structure or guidelines. They may tend to reuse aspects of appeal letters that have performed well in the past. Approaching the letter-writing process as a formulaic exercise may negate any potential benefits of working in a team, as less creativity and idea generation would be needed. Future research should examine more complex fundraising tasks to see if participants benefit from teamwork.

Given the dearth of research on fundraisers and the results of this study that counter a large body of literature, more research on this topic is warranted. If, indeed, the results were because of the fundraiser participants' higher perspective taking and empathic concern, then working in one-person development shops may not be a detriment, at least in this particular fundraising task. If, however, it was the task itself that negated any beneficial effects of working as a team, additional research should determine development tasks that do and do not benefit from the team model. For example, it may be that the process of writing an appeal letter can be performed just as well alone or in a team, but what about understanding the nuance in a donor conversation after a visit has ended? Might such a task benefit from a team-based approach?

Moreover, while most of the results in this study were not significant, some differences were observed when considering the interaction between fundraisers' preference for working alone or together and their random assignment to the conditions. Specifically, those who preferred to work together but were assigned to work alone had *more negative*, *less analytic*, and *less authentic* letters. Although their self-reported subjective ratings did not show disengagement, it was evident in their writing. As P–E fit research asserts, a work environment that is incompatible with a person's characteristics or preferences may impede work attitudes and performance (Brief & Weiss, 2002).

Participants who preferred to work in teams yet were assigned to the solo condition used more words with negative emotions, such as high anxiety, sadness, or hostility. Evidence shows that emotional engagement is associated with a stronger intention to donate (Dickert et al., 2011). In some studies, appeals prompting negative emotions, such as fear, guilt, and sadness, have been found to increased donations (Albouy, 2017; van Rijn et al., 2017). However, negative sentiment alone is rarely an effective strategy for nonprofits to gain volunteers or donors. Instead, the combined use of positive and negative emotions is associated with higher levels of donations and numbers of volunteers (Paxton et al., 2020). Moreover, the type of negativity may influence responses. Empathy is known to be critical in fostering prosocial behavior, but eliciting *other-focused* empathy (e.g., compassion) is important. Otherwise, it is possible for donors to experience *self-focused* personal distress at the expense of charitable action (Kim & Kou, 2014).

Research has demonstrated that prompting hope and happiness may increase giving (Hudson et al., 2016). This may also depend on donors' level of involvement with the charity or cause (e.g., Cao & Jia, 2017). For example, sad versus happy images may result in stronger donation intentions among those who are less involved with a charity, but the reverse is true for those who are highly involved. This finding suggests that committed donors are able to think through the problems and needs of beneficiaries, and happy images help committed donors feel that their donation is making a difference (Bhati & Hansen, 2020). Further, research suggests that positive, hopeful words contribute to a higher degree of success in online crowdfunding campaigns (Zhou et al., 2018).

Participants who preferred to work in a team yet were assigned to the solo condition were less authentic in their writing. That is, their drafts were more guarded and distanced as opposed to a more honest, personal, humble, and disclosing style (Tausczik & Pennebaker, 2009). The algorithm for authenticity was derived from a series of studies in which participants were induced to be honest or deceptive (Newman et al., 2003) and a summary of deception studies published in the subsequent years (Pennebaker et al., 2015). Those who score highly on authenticity tend to be perceived as more personable, humble, and truthful (Pennebaker et al., 2015).

Authenticity may be most relevant to this study because of its ties to trust. Handy (2000) identified trust as the key challenge for charities seeking to raise funds through direct mail campaigns. Writers can build trust by highlighting the charitable status of the organization, noting the longevity of the organization, using celebrity endorsement, or sharing with the reader the percentage of funds spent on administration (Handy, 2000).

Participants who preferred to work in teams but were assigned to the solo condition were less analytic in their writing. This dimension captures the degree to which people use words that suggest logical and hierarchical thinking patterns (Pennebaker et al., 2015), which are necessary to convey a strong case for support (Seiler, 2016). Prior research found that analytical letters containing factual/statistical information had a positive impact on the amount donated relative to those without such information (G. E. Smith & Berger, 1996). When that information conveyed the financial efficiency of the charitable organization, the likelihood of repeat donors giving increased (Parsons, 2007). Using data to illustrate the impact of a specific dollar amount tends to increase the amount donated (Katzev, 1995).

Implications for Practice

Contradicting previous research, this study found that working in teams did not affect objective work outputs or the subjective experiences of team members, at least not on its own. Though more research is needed, findings suggest that the task of writing a charitable appeal letter can be done successfully without a team-based approach.

Some effects were found on the final products of participants assigned to the condition opposing their preferred work style: specifically, those who preferred to work in teams but were assigned to the solo condition produced appeals that were less authentic and more negative. Conversely, those whose work preference was congruent with their assigned condition produced appeals that were more analytic. Misfit was not problematic for the performance of fundraisers who preferred solo work: whether they worked alone or in a team, their letter-writing performance was similar.

Previous research has demonstrated that P–E fit matters to fundraiser retention, as does connection to a cause (Farwell et al., 2020). The findings suggest that lack of fit may also affect fundraiser performance. Participants who preferred working in teams but were assigned to the solo condition produced appeal letters that were less authentic and more negative. Lack of authenticity and excessive negativity in appeals may negatively impact philanthropic behavior (Kim & Kou, 2014). The team-oriented participants who worked in a congruent condition produced more analytical letters—a necessary trait to craft a compelling case for support.

Limitations and Further Research

This study relied on a sample size of 96 participants, which made it difficult to detect small effects. However, we were able to detect small-to-medium effects, and the significant interaction effects highlighted the potential for further research. We suggest that future studies include larger samples of fundraisers to assess the implications of fundraiser fit for objective and subjective outputs. This study produced some indicators of effectiveness, yet future research should also test the effects of the team or solo condition on the number of donations or average gift size given in response to the appeals.

Conclusion

This study counters a large body of research asserting that working in a team, versus alone, can positively affect outcomes, such as performance and team members' satisfaction (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000). The team condition neither affected the final output nor team members' subjective experiences within the context of professional fundraisers drafting a charitable appeal. Interaction effects suggest that the role of work preferences may have impacted the final product. Lack of alignment between fundraisers' work preference and their working condition negatively impacted the quality of their appeals—especially for fundraisers with social preferences. Given the existing research showing that fundraisers are highly sociable (Breeze, 2017) and our finding that they are more empathic than average Americans, we suggest that nonprofit organizations have fundraisers work together, when possible, to ensure the best performance from their staff members.

CHAPTER 4. CONCLUSION

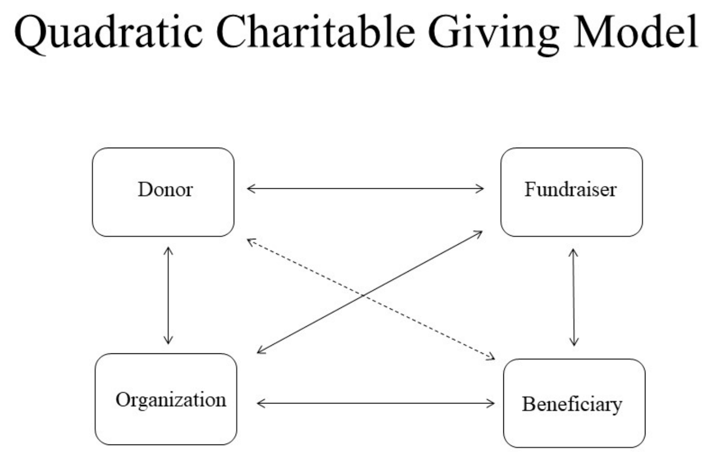
This chapter summarizes the dissertation's purpose, research methodologies, findings, and observations. It notes the strengths and limitations of the research and discusses implications for theory and practice. Finally, it presents ideas for further research.

The Charitable Triad Model, Revisited

As discussed in Chapter 1, the Charitable Triad Model conceptualizes philanthropic behavior as an interconnected social process that includes donors, fundraisers, and recipients (Chapman, 2019). It proposes that charitable giving is driven by the social contexts existing between and among the three actors. Thus, the argument underpinning the model is that donor characteristics alone are not sufficient to generate giving; rather, it is the interconnected roles of all three that result in philanthropic behavior (Chapman, 2019).

This dissertation proposes an extension of the Charitable Triad Model by presenting the organization as a distinct fourth actor, resulting in a quadratic model that allows for relationship dyads and triads amongst the four primary actors: organizations, fundraisers, donors, and beneficiaries (see Figure 7 below). Adding organizations as a distinct fourth actor supports the role of individual fundraisers' agency in making decisions about how to frame charitable appeals (Paper 2; Breeze, 2017; Hansen, 2020; Kelly, 1998; Okada, 2013). The rationale for this extension is described below.

Figure 7. *The Quadratic Charitable Giving Model*



The first paper in this dissertation, reporting on a study on Catholic donors to pro-choice causes, primarily considers the role of donors and their private experiences as they navigated their shifting religious and philanthropic identities from their teen years to middle age. However, it also indirectly considers the roles of recipients and fundraisers. Recipients in this study were individuals in need of reproductive healthcare. As the paper illustrates, the participants gave their first donations to pro-choice organizations out of compassion for individuals who were unable to pay for healthcare services. They described their initial donations as focused on alleviating the cost of direct care for such patients, and they later expanded their pro-choice philanthropy to include other areas, such as advocacy. While they did not know the potential beneficiaries personally, donors imagined their own experiences when deciding to donate. This dynamic is reflected by the dotted line between donors and beneficiaries in Figure 7.

Paper 1 also indirectly investigates an aspect of the donor–fundraiser dyad as presented in the Charitable Triad Model (Chapman, 2019). Charitable giving is rarely done independently by the donor; it is often a result of the donor–fundraiser interaction.

Chapman (2019) presented the donor–fundraiser dyad as mitigated by two primary elements: (1) the closeness of the relationship between the donor and the person doing the asking and (2) the alignment of the donor's philanthropic priorities with those of the appeal. Fundraisers working for pro-choice organizations need to frame their messages to appeal to and energize large cohorts of likely donors. In doing so, they must make strategic decisions about the messages they craft. A divisive message that is effective in galvanizing some donors may be off-putting to others, as participants in this study expressed.

Finally, the paper demonstrates the role of aspects of donors' relationships to other donors in philanthropic behavior. While this role is acknowledged in the Charitable Triad Model, this research highlights the role further by demonstrating the impact of donor-to-donor relationships through a case of philanthropic decisions made in the context of multiple identities. Participants described feeling energized and inspired by other donors and activities in the pro-choice movement. These positive experiences led the participants to deepen their involvement in pro-choice organizations. Later on, participants described having an awareness that they were not the primary target audience of pro-choice organizations and, despite expressing distaste for some pro-choice messaging, acknowledged that the organizations should not dilute their messages to accommodate others, like themselves. They were accepting of messaging they personally preferred not to see if it would further the cause.

The second paper in this dissertation directly examines fundraisers and whether various aspects of their social context affects their subjective work experience or output. In this study, we manipulated their work environment by randomly assigning fundraisers to draft an appeal letter either alone or in teams of two. In light of previous research on work teams, we expected to see differences between the two conditions in both subjective experience and work output. However, our study uncovered no such differences. Though more research is needed to understand the findings, the proposed model currently does not indicate that other fundraisers have a role in influencing fundraiser behavior.

Paper 2 considers fundraisers' knowledge of what potential donors would likely imagine when they think of individuals experiencing homelessness as potential beneficiaries of charitable donations. The fundraisers applied their empathic and perspective-taking skills in crafting appeal letters to generate donor feelings for potential beneficiaries. Out of all the framing tactics coded (including a client story, including data about the recipients or about homelessness as a social problem, referring to trauma, or demonstrating the impact of a specific donation), the participants' most commonly used tactic was the client story. Almost half (48%) the participants included a narrative about a current or former Dayspring Center client in their letters, and of those, all but eight made the stories more personal by assigning the client a name. This finding exemplifies the relationships among and between philanthropic actors inherent in the Quadratic Charitable Giving Model. Fundraisers considered their knowledge of the organization's services for beneficiaries and acted with agency in deciding how best to frame their appeals to elicit donors' philanthropic response.

Finally, Paper 2 illustrates the role of the organization as a distinct actor within the Charitable Giving Model. Our study examined how participants' letters compared to actual letters used by Dayspring Center and revealed few similarities between the letters in the two groups. These results suggest that fundraisers do not serve as a proxy for an organization. Rather, fundraisers serve as intermediaries for the organization, and they fulfill a distinct role. When planning a solicitation, fundraisers have options for how to present their organization and the beneficiaries it serves. Prior research has found that fundraisers make such decisions on the basis of their donors' preferences, the needs of the organization, and, at times, client preferences (Hansen, 2020). Given the agency of the fundraiser as a filter or intermediary capable of shaping organizational communication, the proposed model shifts the charitable giving triad to a quadratic shape to highlight the roles of organizations, fundraisers, beneficiaries, and donors as distinct actors.

The Quadratic Charitable Giving Model: Applications and Limitations

Paper 2 extends previous research demonstrating how fundraisers function as intermediaries for their organizations, applying their agency and individual characteristics to shape appeals that might elicit giving behavior. Previous research has shown how fundraisers' individual skills, values, and judgments shape decisions about how they frame their appeals (Breeze, 2017; Hansen, 2020; Kelly, 1998; Okada, 2013). Paper 2 demonstrates this application of individual characteristics in finding that individual fundraising participants did not replicate the framing approaches used by a real organization, suggesting that organizations and fundraisers should be considered distinct actors.

While not currently reflected in the proposed quadratic model, findings from Paper 1 suggest that the influence of donors on other donors may warrant a more prominent place in future modeling. Further analysis is needed to understand the prominence of the donor–donor relationship in the contexts of the other four actors.

Further, future research should further investigate effects of fundraisers on fundraisers, as well as effects of other organizations on organizational behavior and organization–organization relations.

Questions remain about how elements outside the quadratic model may affect the four philanthropic actors. The inclusion of government funding is one such unknown. As many pro-choice organizations that offer direct services also receive Title X funding, the model may be applied to studies on the crowd-out effects of government funding on philanthropy (de Wit & Bekkers, 2016).

Given prior work on the effects of donor–beneficiary similarity in charitable giving, the proposed model assumes that beneficiaries that share characteristics with donors are more likely to receive aid. However, findings from Paper 1 go beyond this to note how prior experience as a beneficiary also strongly influences charitable decisions, particularly those made in the spirit of gratitude or giving back after having benefitted from a charitable service in the past. Further research is needed to better capture this phenomenon and determine its role within the model, with particular attention to whether donors who have been beneficiaries of pro-choice organizations in the past progress through the stages differently than those who have not.

Paper 1 illustrates a journey shared by participants as they navigated their Catholic and pro-choice activist identities. Their first gifts to pro-choice organizations were driven by compassion for individual beneficiaries more so than advocacy and education work carried out by the organization. By stage 7, participants described making donations to both pro-choice and Catholic human services organizations. They describe being engaged in both the pro-choice and Catholic communities, though not fully embracing all aspects of either one. This suggests elements of complexity within the dyadic relationships of donor–organization not currently captured in the proposed model. Further research may seek to understand how donors with multiple, incongruent philanthropic identities experience their relationships with their chosen charitable organizations in contexts of differing levels of identity salience.

Finally, the proposed Quadratic Charitable Giving Model focuses primarily on financial donors, with some inclusion of gifts of time. Future research is needed to ascertain how the model may be applied exclusively to donations of time or body parts, such as blood or organ donation.

Summary of Study Purposes and Methodologies

Paper 1 extends previous work on social identity by examining the influence of seemingly incongruent identities on philanthropic behavior. This study considered, as a case of discrepant identities, how Catholic women who donate to pro-choice organizations reconcile the tenets of their faith with their philanthropic advocacy for reproductive health. The results provide a theoretical framework for determining the influence of incongruent identities on philanthropic behavior over time. Using grounded theory methods, I examined how such donors have navigated their distinct—and seemingly oppositional—Catholic and pro-choice selves. Grounded theory enables researchers to understand a shared process and the stages within it. Further, it allows researchers to identify markers between these stages and track how individuals progress from one stage to the next (Charmaz, 2014).

Paper 2 examines an aspect of fundraising staff management—team or solo task completion—through the lens of P–E fit theory. A large body of research has found that working in a team, versus alone, can positively affect outcomes such as performance and team members' satisfaction (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000). Using a between-subjects experimental design with a common fundraising task (i.e., writing an appeal letter), the study investigated how working in a team versus alone affects a fundraiser's task satisfaction and work output. Some research has evaluated the effectiveness of specific tactics used in the drafting of donor appeal letters (Bhati & Hansen, 2020; Hansen, 2020), however, little research has explored how fundraisers choose their messages. Even less is known about how fundraisers' working conditions and preferences may affect how they shape their case for donating. This study explored how working in a team, versus alone, affects fundraisers' subjective experiences of writing appeal letters for a nonprofit organization. Further, it examined how teamwork affects linguistic elements of the actual appeal letter compared to working alone. It also probed whether these results depend upon fundraisers' preferences for working together or alone. Finally, it explored how fundraisers' letters differed from those of an actual nonprofit organization and how fundraisers differ from the general U.S. population in their empathy levels.

Together, these two papers question whether and how existing theories of social contextual factors—social identity and P–E fit—apply to two understudied populations in the context of the philanthropic process.

Summary of Key Findings

In the study in Paper 1, I developed a model, grounded in the participants' accounts, that illustrates the shared trajectory of the women's journey from conservative pro-life Catholics to Catholic pro-choice donors and activists. Participants shared a common process in navigating their conflicting beliefs from childhood to middle age. A common approach to addressing dissonance is to increase the attractiveness of the preferred alternative and decrease the attractiveness of the rejected alternative (Perloff, 2008). This effort to decrease the attractiveness of an out-group may result in the out-group's degradation (Hogg, 1992). Participants adopted this approach early on their journey when they rejected Republicans and reduced their Catholic practices as their pro-choice identity increased in salience. This dynamic continued with their first donations to pro-choice organizations and their deepening involvement in the pro-choice movement. Upon reaching stage 7, when both identities had become salient, they expressed distaste for polarizing rhetoric that discredits either group.

As adults and into middle age, participants discovered ways of adapting their behavior to return to Mass or otherwise deepen their religious practice without compromising their pro-choice values. At this point, participants expressed less dissonance and more assurance that their two selves were not incompatible. Prior research has illustrated how activating two identities simultaneously may lead to behavior that compromises both (Blader, 2007; Ramarajan, 2014). This may explain the participants' sense at stage 7 that despite identifying with both Catholicism and the pro-choice movement, they did not fully accept either one. Their Catholic and pro-choice identities were both salient and they expressed a distaste for the very divisive rhetoric in which they had engaged during earlier stages.

Much of the peace participants described feeling at stage 7 was the result of having successfully navigated perceived conflicts between Catholic doctrine and values rooted in individual conscience. The right to follow one's own conscience in the face of unjust statutes has been championed by the Catholic Church for several hundred years (Cajka, 2021). American Catholics, in particular, amplified a distinctly American discourse on the intersection of individualism and conscience that was evident in the founding of the Massachusetts Bay Colony, draft protests during the Vietnam War, and debates over contraception in the late 1960s (Cajka, 2021). The latter sparked debates within the Church on the supremacy of doctrine or conscience in matters related to contraception. The 1968 papal encyclical *Humanae Vitae* (Of Human Life) attempted to end the speculation by reaffirming the Church's traditional teachings against artificial contraception, yet the debates continue to this day (J. E. Smith, 1991). Participants in the study, however, felt no conflict or dissonance by stage 7. They had embraced an overarching value of compassion rooted in both their Catholic and pro-choice selves, thereby allowing them to transcend any cognitive dissonance.

The study in Paper 2, on the effects of teamwork for fundraisers writing appeal letters, found no differences in the participants' subjective experiences nor their work output. This runs counter to extensive previous research noting the beneficial effects of teamwork (e.g., Bettenhausen, 1991; Cohen & Bailey, 1997; Goodman et al., 1987; Guzzo & Shea, 1992; Sundstrom et al., 2000). This result raises the question as to why the fundraisers in our study did not benefit from the team environment. One potential explanation is that the fundraising profession and the fundraisers themselves are unique. This was the first study, to our knowledge, to demonstrate that fundraisers rate higher in perspective-taking and empathic concern than the general population. When fundraisers plan their appeals, they may apply their higher perspective-taking and empathic skills to help them consider the reactions of a potential donor, thereby reducing any potential benefits of working in a team. A second potential explanation for fundraisers not benefitting from the team model in this study may be the task performed. Fundraisers may approach the process of writing a charitable appeal letter as formulaic, following a given structure or guidelines. They may tend to reuse aspects of appeal letters that have performed well in the past. Approaching the letter-writing process as a formulaic exercise may negate any potential benefits of working in a team, as lower levels of creativity and idea generation would be needed.

While the main effect of working in a team or alone was not significant, some differences were observed when considering the interaction of fundraisers' preference for independent work versus teamwork and their random assignment to conditions. Those who preferred to work in teams but were assigned to the solo condition produced letters that were more negative, less authentic, and less analytic. Appeals that are overly negative and inauthentic may reduce fundraising effectiveness, while an analytic approach may increase their effectiveness. Thus, our findings support prior P–E fit research asserting that a work environment that is incompatible with a person's characteristics or preferences may impede work attitudes and performance (Brief & Weiss, 2002).

Together, these two papers extend and refine existing theory, inviting a more nuanced understanding of how social context may shape both donor and fundraiser behavior.

Conducting Research in Times of Crisis

All interviews with Catholic donors to pro-choice organizations were conducted between June 2020 and January 2021, a period marked by the global COVID-19 pandemic and rising social unrest in response to the murder of George Perry Floyd Jr. by a Minneapolis police officer. By the time interviews began, every U.S. state had endured some level of economic lockdown in an effort to contain rising rates of infection. Increased unemployment as well as food and housing insecurity followed. Floyd's murder on May 25 had triggered a wave of protests across the world, though they were mostly concentrated in the United States. The twin crises had put a spotlight on the deepening inequality already prevalent in the nation, and conversations about racial and economic justice had risen to new prominence. The trials of this period affected every person, study participants included. In this section, I reflect on how this tumultuous time shaped the research process and the additional findings that emerged.

As a result of the pandemic, many of the women I interviewed were working remotely from home, often alongside their spouses. Several had children whose schools had shifted to at-home online learning in response to the pandemic. Although participants expressed interest and, at times, even eagerness to talk, they found it challenging to secure privacy to discuss the sensitive topics of abortion and religion. They addressed this challenge with planning and creativity: three participants met with me while sitting on their bedroom closet floor, holding their laptop, and four met with me while sitting in their car parked in their driveway.

I asked participants about their philanthropic giving during these economically uncertain times. Two of the 20 participants had chosen to pause all their philanthropy in 2020 due to this uncertainty, though both asserted that they planned to resume giving their regular annual gifts to pro-choice organizations when they feel more financially secure.

Other participants described having recently expanded their philanthropy to more causes in response to challenges posed by the pandemic and increasing attention toward racial injustice. Eight reported making their first donations to Black Lives Matter or a bail bond fund after learning more about the extent of racial injustice in the wake of Floyd's death. Sharon noted, "I read, I read some more, and I just made the (Black Lives Matter) donation. If anything, I'm embarrassed I hadn't sent in a donation to them before." Others had recently made donations to food banks or food pantries after seeing the rising need for food in their communities. These gifts were described as being, as Caroline put it, "something I just had to do. I just had to. I mean, you can't see those long lines of cars (waiting at the food pantry) and not do something." Kelly echoed a familiar refrain when she noted, "I'm so fortunate to still have a job. Those of us who are lucky enough to be able to give need to give."

I was curious how participants balanced these new, unplanned gifts with their other philanthropic commitments. One participant made donations to Black Lives Matter instead of making her annual summertime donation to Planned Parenthood. Others explained that they did not have to sacrifice their regular pro-choice giving during this time despite supporting new organizations. These participants explained that working from home during the pandemic lockdown had reduced their daily spending on commute-related expenses, such as gasoline, parking, and coffee, and they channeled these savings into new philanthropy. As Cheryl explained, "I can't remember the last time I filled up my car, because I don't commute in to work anymore. I'm probably spending less on clothes and stuff. So, I assumed we had that money to give." Emily expressed a common sentiment when she noted, "It wasn't too hard (to give) because with everything closed, we aren't going out to dinner or going to the movies." Beth, who had also increased her giving to her community food bank, expressed a common stance when she said, "I didn't think too hard about it; I just did it. I knew I would find the money. This is what is needed now. It just needs to happen."

While most participants expanded their giving to meet new needs exacerbated by the pandemic and social unrest, they all acknowledged that the pro-choice cause was still one of their philanthropic priorities. Participants explained that while basic needs and racial justice were in the spotlight, pro-choice organizations continued to depend on philanthropic support. Erika shared her reasoning when she stated, "We can't let up now. We have to keep the focus on reproductive rights. But it can be one of two or three priorities given all that's happened the past few months." After sharing her apprehension about the pending confirmation of conservative Amy Coney Barrett to the Supreme Court, Melissa explained, "I know they always say that *Roe v Wade* is at risk. They've been saying that all my life, but now… now it's no joke. So, yeah, unless I lose my job completely, I'll continue giving (to pro-choice organizations)."

Similarly, Jennifer shared her plans to continue her regular pro-choice donations due to the continuing need:

> My last donation was to community bail funds. I've been reading a lot about bail funds since the protests started… But I'll still send in my regular gift to Sister Song at the end of the year. They still need it, right? They depend on it.

The participants' giving behavior during the pandemic further illustrates the contextualized relationships among and between donors, fundraisers, beneficiaries, and organizations. Those who were able to continue giving did so in response to an increased need or awareness of that need. Seeing people wait in long lines at food pantries and reading about the challenges of those arrested during Black Lives Matter protests prompted participants to give, give more, or give to new causes. This finding mirrors reports that overall giving increased by 2% during the pandemic (Blackbaud Institute, 2021). Meanwhile, participants' commitment to organizations that stand for pro-choice ideals remained strong. In giving gifts to pro-choice organizations that provide direct services, participants could imagine a theoretical beneficiary whose health may be improved as a result of the donation. Unrestricted gifts or gifts to advocacy funds, however, suggest a commitment to the organization itself, belief in its mission, and trust in its ability to improve access to safe and legal reproductive healthcare. Future research may compare these findings to past giving in times of crisis, such as after natural disasters or other past pandemics. Of particular interest would be issues related to motivation and the balance of crisis response giving with existing commitments to other philanthropic causes.

Impact on Theory and Implications for Practice

Paper 1 presents the first study, to my knowledge, to consider the role of multiple, incongruent social identities in donor behavior. It refines existing theory on social identities by considering the role of two seemingly incongruent identities in philanthropic behavior. Further, it presents a model that can be used to test new empirical cases of incongruent identities shaping the philanthropic response.

Paper 1 deepens our understanding of donor motivations and presents a framework through which donors may gain appreciation for higher levels of complexity and nuance in their philanthropic journey. Many efforts to evaluate potential donors have used socioeconomic information that fails to capture the multiple social identities that shape philanthropic behavior. A fundraiser for a pro-choice organization, for example, may be tempted to assume that a potential donor noted as Catholic is an unsuitable match for the organization. The 20 donors interviewed in this study—all loyal, regular donors to pro-choice organizations—illustrate that such an assumption would be a mistake. While fundraisers often need to evaluate prospective donors efficiently, and do so in a manner that makes the best use of limited resources for donor cultivation, Paper 1 highlights the benefit of deeper consideration when possible. Rather than assuming a prospective donor will never donate given a few data points, such as religion, education, or race, fundraisers might consider how life events can alter a person's perceptions, beliefs, and values over time.

Further, the participants' comments about the framing of pro-choice appeals underscores the need for organizations to consider their messaging and tailor approaches to specific types of donors. Using divisive rhetoric or highlighting differences between in-groups and out-groups may be effective for established donors involved in advocacy, but prospective donors or regular donors who contribute to direct care for clients in need may find such language off-putting. Whether drafting language for an appeal letter, updating an organizational website, or preparing for an individual donor visit, it is essential to consider the myriad ways that donors may have found their way to the organization—as well as the multiple experiences and identities that may have shaped that journey.

Paper 2 tests prior theory on teamwork with fundraisers, a population on which little research is available. Results counter a large body of existing research supporting the benefits of teamwork and raise new questions as to what makes fundraisers or the task of writing an appeal letter different from earlier studies. The answer may lie in traits unique to or predominant in fundraisers. Higher levels of empathic concern or perspective-taking among professional fundraisers may shape how they approach their work. Such traits enable fundraisers to better predict donor responses and influence donor decision-making.

Findings presented in Paper 2 suggest that one-person development shops may be just as effective at drafting appeal letters as larger development teams. More research is needed to determine if this finding relates to other development tasks, such as other types of development writing, donor meetings, or post-meeting evaluation. Findings also suggest that while the team or individual work approach makes no difference for fundraiser experience and output, the fundraisers' work style preference and organizational fit may indeed affect fundraiser experience and output. Specifically, lack of alignment between the work preference and working condition negatively impacted the quality of the appeals—especially for fundraisers who prefer to work in teams. Existing research has shown that fundraisers are highly sociable (Breeze, 2017), and Paper 2 finds that fundraisers are more empathic than average Americans. Therefore, nonprofit organizations might consider encouraging fundraisers to work together when possible to maximize their performance.

Overall, this dissertation provides evidence-based insights for nonprofit donor communication and management that can be immediately applied at no cost to improve fundraising practice.

Strengths and Limitations

Paper 1 examines Catholic donors to pro-choice organizations. While previous research has examined how pro-choice Catholics explain their beliefs, no studies, to my knowledge, have done so in the context of their philanthropic behavior.

Unlike quantitative studies, qualitative studies do not seek to generalize to the larger population in the way a study would if using a representative sample and generalizing according to probability theory. Instead, qualitative research finds value in capturing nuance that provides new insights and understandings (Merriam, 2002). Nevertheless, findings from this project can refine existing theory, which can then be tested in new empirical cases (Yin, 2013).

Finally, using snowball sampling for a portion of the recruitment resulted in some homogeneity within the sample. All participants were college-educated and most were white with high philanthropic participation. Consequently, some perspectives and experiences may remain unexplored and unrepresented in this study's findings. For example, the experiences of more women Catholics of color or those without college-level education may differ from the progression shared by those in the sample. Further, due to the high levels of formal Catholic education within the sample, these participants may have been more familiar with concepts from the Catholic tradition, and such knowledge could validate any beliefs that dissent from papal authority. However, prior research on pro-choice Catholics has suggested that other dissenting Catholics similarly reinterpret Catholic teachings to navigate their beliefs (Dillon, 1999; Tentler, 2004).

Paper 2 examines the understudied population of fundraisers. While other research has examined who fundraisers are and how they learn their trade, few studies have examined how the social environment affects the output of their work. This paper is the first, to my knowledge, to consider how fundraisers craft appeal messages within the context of P–E fit theory. It is also the first to find that fundraiser empathy levels are significantly higher than those of the general U.S. population.

The study relied on a sample size of 96 participants, which yielded low statistical power that did not reveal small effects. However, the effect size revealed small to medium effects, and the interaction effects highlight the potential for further research.

Both papers advance our knowledge by examining populations for which there is little research, and they invite further questions, which I describe below.

Implications for Future Research

The study in Paper 1 applied identity theory to examine donor behavior in the context of incongruent identities. This theory is traditionally used to explain situational, short-term shifts in identity salience triggered by contextual and environmental factors (Amiot et al., 2007). The proposed model points to specific contextual triggers that facilitate the transition from one stage to the next. However, the study also revealed long-term shifts in identity salience at two distinct points in the lifespan—when entering early adulthood and when entering middle age—suggesting a need to further examine this trajectory through a developmental lens. Participants attributed meaning to events in their lives and examined or reexamined that meaning within the context of their evolving social identities, which suggests a developmental process.

This study included participants from two generations—Generation X (born 1965–1980) and Millennials (born 1981–1996). However, one participant, Gina, who was not included in the analysis, was a 21-year-old member of Generation Z (born 1997–

2012). She progressed more quickly than those described here. Gina's atypical progression suggests a need to examine differences among more generations of pro-choice Catholic women.

Finally, future research may examine how traditional pro-life Catholic organizations perceive their relationships with Catholic pro-choice donors on issues other than abortion. Participants noted their current giving to Catholic causes, particularly those providing human services, such as food and housing, for those in need. These organizations benefit from donors who share their interest in helping people who are disadvantaged, yet they may hold opposing perceptions of sexual and reproductive health issues and even what it means to be a "real" Catholic.

The study in Paper 2 asked if team-based appeal writing affects fundraisers' satisfaction and the content of the letter produced. The crucial measure in fundraising, however, is the appeal letter's effectiveness, usually measured by the response rate, total charitable revenue, and average gift size. A large body of literature argues that working as a team, as opposed to alone, can increase both satisfaction and effectiveness. However, this study found no such difference in satisfaction as a result of team-based appeal writing. Thus, the question of whether team versus solo writing ensures the effectiveness of appeals remains unanswered.

Future research should examine whether the team condition affects the success of the letters, as measured by donation revenue acquired though team-written or solo-written appeals. This could be done as an online experiment in which participants view either a team-written or solo-written letter and then complete a survey asking for their perceptions of the organization. The survey would explain that they have just read about a real nonprofit organization and include the option for the participant to donate a portion or all of their payment to the organization (see Appendix H).

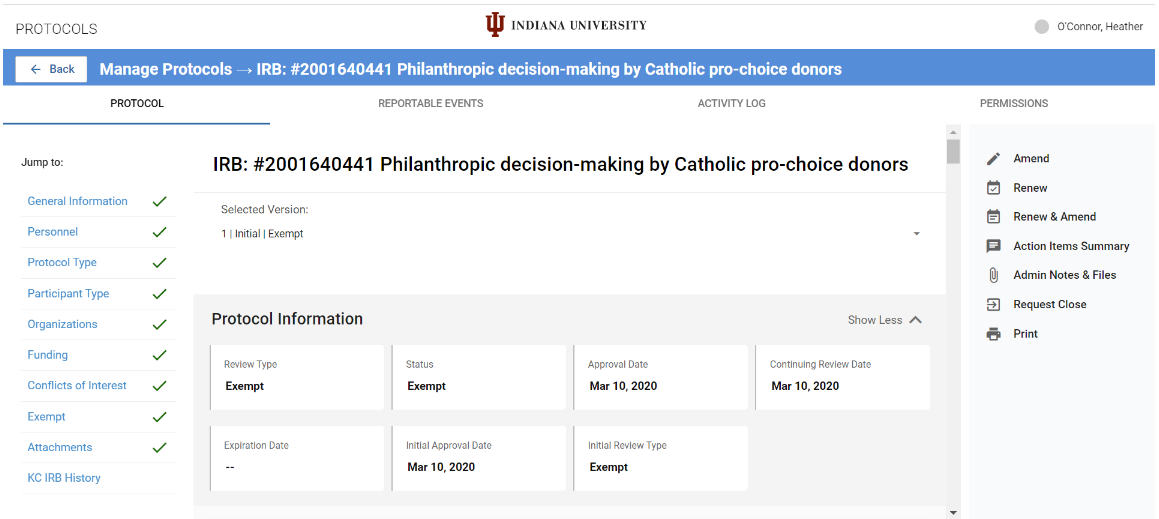
Conclusion

This dissertation makes a theoretical contribution to the understanding of social context as an influence on both donor and fundraiser behavior. It considers donors as complex individuals possessing multiple and sometimes incongruent social identities, and fundraisers as influenced by the social environment of their work conditions. This research makes a methodological contribution to the field of philanthropic studies by using in-depth interviews with a donor population not previously studied and an experiment with real fundraisers, a population on which little research exists.

Together, these two studies inform fundraising theory and practice by presenting a Quadratic Charitable Giving Model that conceptualizes fundraisers, organizations, donors, and beneficiaries as four actors that shape philanthropic behavior. The argument supporting the model is that charitable giving is the product of the contextual relations among and between all four actors as well as the broader social context in which they operate. By approaching the study of charitable behavior with appreciation for these integrated, relational dynamics, we can better understand the functions of philanthropy for both self and society.

APPENDICES

Appendix A. IRB approval for Study 1


PROTOCOLS

INDIANA UNIVERSITY

O'Connor, Heather

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PROTOCOL | REPORTABLE EVENTS | ACTIVITY LOG | PERMISSIONS

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- Organizations
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- Conflicts of Interest
- Exempt
- Attachments
- KC IRB History

IRB: #2001640441 Philanthropic decision-making by Catholic pro-choice donors

Selected Version:

1 | Initial | Exempt

Protocol Information

Show Less

Review Type	Status	Approval Date	Continuing Review Date
Exempt	Exempt	Mar 10, 2020	Mar 10, 2020

Expiration Date	Initial Approval Date	Initial Review Type
--	Mar 10, 2020	Exempt

- Amend
- Renew
- Renew & Amend
- Action Items Summary
- Admin Notes & Files
- Request Close
- Print

Appendix B. Informed Consent

Document Id: 86683387
Protocol #: 2001640441

Indiana University Study Information Sheet

PHILANTHROPIC DECISION-MAKING BY CATHOLIC PRO-CHOICE DONORS

You are invited to participate in a research project on the role of religious belief and behavior in philanthropic decision-making. We ask that you read this form and ask any questions you may have before agreeing to be a part of this study.

The study is being conducted by Heather O'Connor, a Ph.D. candidate at Indiana University's Lilly Family School of Philanthropy.

STUDY PURPOSE

This study aims to understand the motivations and decision-making processes of female donors to pro-choice organizations who either identify as Catholic or engage in Catholic practices. The study involves interviews with female donors to pro-choice organizations who either identify as Catholic or attend Mass. The primary research question is as follows: How do the religious beliefs and/or practices of Catholic-identifying and/or Mass-attending pro-choice donors influence their philanthropic decision to support pro-choice organization(s)?

PROCEDURES FOR THE STUDY

If you agree to participate in this study, you will participate in a confidential, in-depth interview with the researcher. The interview will last approximately an hour but will not exceed 90 minutes. If you agree, it will be digitally recorded. The entire project will be concluded by 2021.

RISK AND BENEFITS

There is minimal risk and/or benefit to participating in this study. No questions are asked to intentionally elicit painful experiences, and you may decline to answer any question. Security measures will be taken to protect your identity and confidentiality.

CONFIDENTIALITY

Efforts will be made to keep your personal information confidential. Your personal information will be disclosed if required by law. Your identity will be held in confidence in any publications. The digital recordings of interviews will be available to the research team until transcription takes place. At that point in time, audio recordings will be deleted.

Organizations that may inspect and/or copy your research records for quality assurance and data analysis include the research team, the Indiana University Institutional Review Board, and (as allowed by law) state or federal agencies, specifically the Office of Human Research Protections (OHRP), who may need to access research records.

CONTACTS FOR QUESTIONS OR PROBLEMS

For questions about this project, contact Heather O'Connor at XXXXX or Sara Konrath, PhD., at XXXXX.

VOLUNTARY NATURE OF THE PROJECT

Participation in this project is voluntary. You may choose not to take part, may refuse to answer any question, and may exit the study at any point in time. Leaving the project will not result in any penalty or loss of benefits to which you are entitled. Additionally, your decision whether or not to participate in this project will not affect your current or future relations with Indiana University.

Appendix C. Qualitative Interview Guide

I appreciate your willingness to participate.
The main reason why I would like to interview you is to learn about your experiences with charitable giving and giving to pro-choice organizations in particular. I am interested in your Catholic upbringing, if it informs your charitable giving, and if so, how.
Findings from this study will be used to help understand how women make charitable decisions and may help nonprofit organizations reach more potential donors.

Interviewee Role: I want you to feel that this is your interview. I am here to listen to what you have to say. I am very interested in your experiences and feelings, so please feel free to share anything that comes to mind. My job is to listen to you so that I can better understand these experiences. If I ever ask you a question you would prefer not to answer, just say "pass" and we'll skip that question.

Explain Audio Recording Procedures: With your permission, I will record our conversation so that I do not have to take notes and so I can get your complete answers. This also helps me guarantee that my report will accurately reflect your experiences.
But maintaining your privacy is the most important thing to me and anything you say during this interview will be kept private and confidential. So, after the interview, I will listen to the recording and type up the interview. I will not include your name or any other unique information that identifies you or your family. Your name will not be included in my data files or report. When I have finished my project, the recorded copy of the interview will be erased. Is this all okay with you?

Time Frame of Interview: The interview will last about an hour. If you need a break at any time, just let me know.
Thank you for your help with the study. Do you have any more questions before we start?

Gain Verbal Consent and Start Interview:
Okay then, I will begin recording the interview now.
We are now recording. Today is _____________.

Overall Philanthropy
Let's start by talking about the last time you supported any type of charitable nonprofit organization through a financial donation.

The organization may have been about health, or the arts, animals and the environment, religion, education, or international causes.

Walk me though what led up to that donation. What did you give? And to what type of organization?

Can you tell me about a second example that was different? (different in any way, in your view.)

How do these two examples reflect your giving, generally? How do they differ?

Tell me about the last time you supported a cause or organization in a way that did not involve giving money. Perhaps you volunteered time or donated an item.
What type of organization was it?
What led you to give in this way?

How do these examples reflect your overall giving?

Can you tell me about what other causes you tend to support? How?

Can you tell me about any organizations that you tend to support most regularly?
How? What type of organizations?

Have the causes you support changed over the years? How?

Would you say you have an overall philosophy or approach when it comes to giving?

Our world has changed in many ways over the past six months. Have recent events affected your giving? If so, how?

Religious Life

Let's chat a bit about the role of faith or religion in your life.

How would you describe your current religious affiliation or identity?
How has that changed over the years, if at all?

Can you tell me about how you practice your religious beliefs?
How have those beliefs or practices changed over time?

If applicable: And what about your spouse? Do you share the same religion or practices?

Can you tell me about if and how your faith informs your giving?
Can you walk me through an example?

Pro-choice Philanthropy

We talked earlier about your general philanthropy. Now, let's focus on your giving and volunteering to pro-choice organizations specifically.

Tell me a bit about when and how you first became involved with a pro-choice organization either as a volunteer or as a financial donor. Can you walk me through what happened?
When was your first gift of money or time to a pro-choice organization?

What organization?
What prompted that decision to give?
How did you give? Through the mail, at events, online? Extra at checkout?
Anonymous?
Tell spouse or partner?

Can you tell me about the last time you gave in some way to a pro-choice organization? What did you do?

Has your involvement with pro-choice organizations changed over time? How?

Tell me how you are involved in pro-choice organizations today.

How would you describe the ways in which your pro-choice philanthropy fits into your faith? How does your faith inform your decision, if at all?

We've talked about your giving to pro-choice organizations. What about pro-**life** organizations?
Have you even donated money or time to a pro-life cause? Can you walk me through that?

On Abortion

We've talked about your support of pro-choice organizations. Now, can you tell me how you would describe your views on abortion?
Does that differ for different circumstances?

Could you tell me about any experiences or people that have shaped your views on abortion?

How would you describe the Church's teaching on abortion?

How would you describe the Church's response to the diversity of American society? By that I mean the Church's stance on LGBTQ inclusion, female priests, or contraception?

Intersection of Faith and Philanthropy

Let's think about faith and philanthropy together.

How would you describe how your philanthropy fits into your faith?
Or how your faith fits into your philanthropy?

Let's talk a bit about how much you want or don't want people to know about your position on abortion and giving.

Do your friends at church know about your pro-choice philanthropy? Can you tell me about that? Can you describe a conversation you've had with Catholic friends about this issue?

Do your pro-choice friends know about your faith? Can you tell me about that?

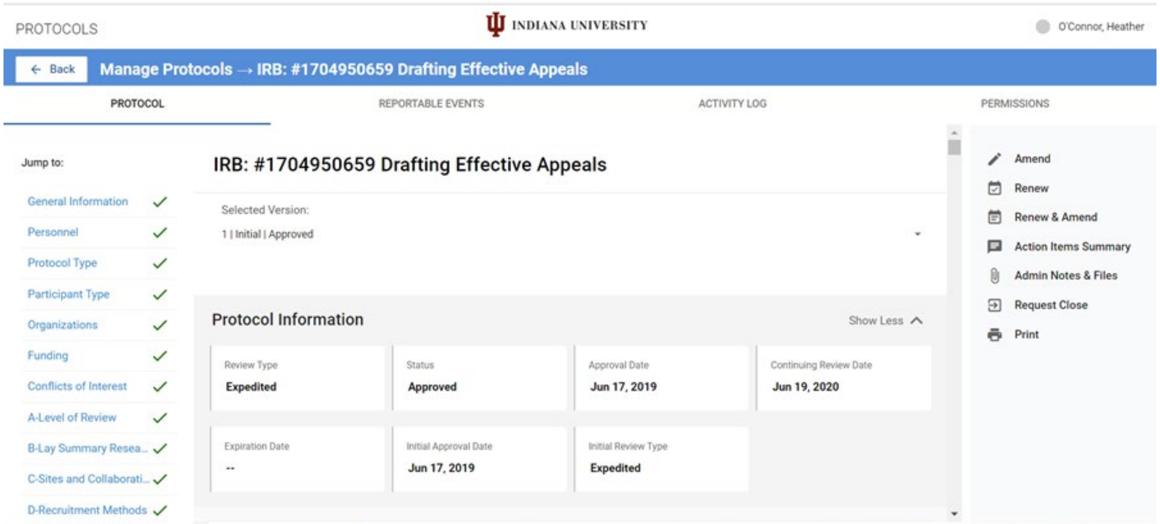
We're almost done with my questions, but first, I want to ask you about your thoughts on feminism. Would you describe yourself as a feminist? What does the term mean to you?

Closing Question

Is there anything else that I didn't think to ask that you would like to share about your experiences related to charitable giving for pro-choice causes or pro-choice organizations?

As a way of thanking you for your time, I'd like to make a $50 donation in your name to the nonprofit organization of your choice. Which organization would you like to choose? Would you like to be recognized or shall I ask to have it be anonymous?
Finally, are there any other women you know that I might speak with?
If you have any additional questions or just want to talk about the interview experience, please feel free to give me a call or email me.

Appendix D. IRB approval for Study 2



Appendix E. Study 2 Survey

PARTICIPANT ID NUMBER (RESEARCHER TO COMPLETE): ___________

Gender: _________

Years of experience in nonprofit resource development / fundraising: ________

How many people work at your organization? ________________

Number of people who work in fundraising / development at your organization: __________

The average annual revenue of your organization:

□ Less than $500,000 □ Between $500,000 and $3M □ Between $3M and $10M □ Over $10M □ I'm not sure

I completed the fundraising letter □ **ALONE** or □ **IN A TEAM** (check one)

I generally prefer to work □ **ALONE** or □ **IN A TEAM** (check one)

In my current job I most often work □ **ALONE or** □ **IN A TEAM** (check one)

You drafted an appeal letter for a real organization. How effective do you think the organization is? (circle one)

1 2 3 4 5 6 7
not effective **very effective**

Would you personally want to donate to the organization? (circle one)

1 2 3 4 5 6 7
not at all **very much**

To what extent do you agree with the statements below? For each question, please write a number 1 – 7:

1 2 3 4 5 6 7
Does not describe me well **Describes me very well**

______ I identify with nonprofit development professionals / fundraisers.

______ I feel committed to nonprofit resource development / fundraising as a career.

______ I am glad to be a nonprofit development professional / fundraiser.

______ Being a nonprofit development professional / fundraiser is an important part of how I see myself.

Check any types of involvement with homeless-serving organizations in the past 2 years:

☐ Worked (for pay) ☐ Made a charitable donation ☐ Volunteered time

Please circle a number for each statement below:

After having completed this task…	Disagree strongly	Disagree moderately	Disagree a little	Neither agree nor disagree	Agree a little	Agree moderately	Agree strongly
I feel that potential donors will like the letter.	1	2	3	4	5	6	7
I feel a sense of pride in my letter.	1	2	3	4	5	6	7
I generally enjoy writing appeal letters.	1	2	3	4	5	6	7
I enjoyed writing this appeal letter today.	1	2	3	4	5	6	7
I liked my team member. *(if applicable)*	1	2	3	4	5	6	7

Please TURN OVER and complete other side →

I see myself as	Disagree strongly	Disagree moderately	Disagree a little	Neither agree nor disagree	Agree a little	Agree moderately	Agree strongly
Extraverted, enthusiastic	1	2	3	4	5	6	7
Critical, quarrelsome	1	2	3	4	5	6	7
Dependable, self-disciplined	1	2	3	4	5	6	7
Anxious, easily upset	1	2	3	4	5	6	7
Open to new experiences, complex	1	2	3	4	5	6	7
Reserved, quiet	1	2	3	4	5	6	7
Sympathetic, warm	1	2	3	4	5	6	7
Disorganized, careless	1	2	3	4	5	6	7
Calm, emotionally stable	1	2	3	4	5	6	7
Conventional, uncreative	1	2	3	4	5	6	7

The following statements inquire about your thoughts and feelings in a variety of situations. For each item, indicate how well it describes you by writing the appropriate number. When you have decided on your answer, fill in the letter next to the item number. Read each item carefully before responding. Answer as honestly as you can.

1 2 3 4 5 6 7

Does not describe me well — Describes me very well

_____ 1. I often have tender, concerned feelings for people less fortunate than me.
_____ 2. I sometimes find it difficult to see things from the "other guy's" point of view.
_____ 3. Sometimes I don't feel very sorry for other people when they are having problems.
_____ 4. I try to look at everybody's side of a disagreement before I make a decision.
_____ 5. When I see someone being taken advantage of, I feel kind of protective towards them.
_____ 6. I sometimes try to understand my friends better by imagining how things look from their perspective.
_____ 7. Other people's misfortunes do not usually disturb me a great deal.
_____ 8. If I'm sure I'm right about something, I don't waste much time listening to other people's arguments.
_____ 9. When I see someone being treated unfairly, I sometimes don't feel very much pity for them.
_____ 10. I am often quite touched by things that I see happen.
_____ 11. I believe that there are two sides to every question and try to look at them both.
_____ 12. I would describe myself as a pretty soft-hearted person.
_____ 13. When I'm upset at someone, I usually try to "put myself in his shoes" for a while.
_____ 14. Before criticizing somebody, I try to imagine how I would feel if I were in their place.

To what extent do you agree with this statement: "*I am a narcissist.*" (Note: The word "narcissist" means egotistical, self-focused, and vain.) Circle one:

1 2 3 4 5 6 7

not very true of me — very true of me

The nonprofit subsector I currently work in is: (circle one)

Health   Arts / Culture   Religion   Environment / Animals   Education   International Affairs
Human Services   Grant Making Foundation   Public Society Benefit / Federated Campaigns

The nonprofit subsector I most frequently give time or money to is/are: (circle one ore more)

Health   Arts / Culture   Religion   Environment / Animals   Education   International Affairs
Human Services   Grant Making Foundation   Public Society Benefit / Federated Campaigns

Appendix F. LIWC Category “Worthy Recipient”

earn*
work*
employ*
trade
made
make*
wage*
earn*
pay
paid
income
salary
bring in
brought in
secure
job
underpaid
attack
abus*
beat*
harm
hurt
hit
beat up
mistreat*
victim*
medical
health
cancer
elderly
aged
retired
aging
ill*
ailment
disability
disable*
disorder*
sick
syndrome
mother
mom
aunt
grandmother
father
dad
uncle
brother
sister
grandfather
grandparent
grandpa
grandma
child*
kid
deserv*
merit*
worth*
warrant*
fault
blame*
but
yet

Appendix G. Coding Manual

Coding Manual

Dimension 1 – Client story and naming

2= Client story clearly present and names the client	1= Client story present but does name the client	0= Client story absent or ambiguous
A story about a particular client – with the client named - is present in a letter when it includes a personal narrative, written either in first or third person, about a specific person or persons who have been clients of the organization. The story may or may not name the person. e.g. "John came to us after losing his job…" e.g. "Mary and her three children…" The narrative may or may not include a direct quote. e.g. "I'm grateful I found the good people at the Center." e.g. "Susan told us that she now has a full-time job…"	A story about a particular client – without the client named - is present in a letter. *This includes a client quote that does not name the client.	If no client story appears in the letter. *The letter may discuss clients as a group, but does not discuss the story of one family or individual. e.g. "Last year, we helped almost 500 families…"

Dimension 2 – Data points: Clients and programs

1= Data about the clients and the programs present	0=No data about the clients and programs present
These include specific data (numbers, stats) about the organization or clients served. e.g. "Last year, we helped almost 500 families…" e.g. "…almost eighty percent of those who graduate from our program remain in stable housing 6 months later." (1 point) e.g. "the shelter operates 24/7" These included statements about the impact of a gift that refers to clients. e.g. " Your gift of $50 can help serve one family of four."	This includes letters that refer to an enclosed brochure but have no data points in the letter itself.

Dimension 3 – Data points: Social problem and need

1=Data about the social problem or need	0=No data about the social problem or need present
These include data (numbers, stats) about homelessness as a social problem. e.g. "…almost 3,000 people are homeless in our community, and one-fifth of those are children." e.g. "…two-thirds of women who experience homelessness have 1 or more children under the age of 12." e.g. "homeless children are twice as likely to know hunger, and four times as likely to fall behind their peers in their development."	This includes letters that refer to an enclosed brochure but have no data points in the letter itself.

Dimension 4 – Traumatic events

1= Reference to past trauma is present	0= Reference to trauma is absent
Trauma is present in a letter if reference is made to illness, death, major financial hardship, or witnessing or experiencing abuse or violence. e.g. "Herman lost his job when…" e.g. "The day he hit their daughter, Susan knew she had to leave…" e.g. "She lost her husband to cancer…" e.g. "Children who are experiencing homelessness are more likely to suffer from physical and emotional challenges…" (reference to health conditions)	If no reference to trauma (beyond homelessness) is present

Dimension 5 –Gift impact: Specific for dollar amount

1= Gift impact is present and specific	0= Gift impact is absent
Gift impact is present and concrete if the letter clearly states the potential impact of gifts of particular size(s). The dollar amount may be provided, or an X or blank line may be present where the amount would go. e.g. "Your gift of \$30 will provide one week's worth of food for a family in need." e.g. "A donation of \$X provides crucial job-training services for one month…"	If no gift impact statements are present. This includes asking for a specific amount but not saying anything about the impact of giving.

Dimension 6 –Gift impact: Abstract impact

1=Gift impact is present and abstract	0= Gift impact is absent
Gift impact is present and abstract is there is reference to the overall impact of giving, but not about a gift of a particular value. e.g. "Your gift will give hope to those in need." e.g. "Your donation will help more people like John find safety, security, and hope for a better future." e.g. "We ask you to join a robust community of supports to help feed, clothe and assist homeless families with children in (region) by making a donation today." These letters make some reference to the overall impact of giving, but do not explicitly say the impact of a gift of a particular value.	If no gift impact statements are present.

Appendix H. Proposed Survey for Future Research On Dayspring Letters

The following questions ask about your charitable giving history. Any response is fine, and you can continue with the study even if you have never given to a charity in the past.
Have you ever donated money to a charitable organization? Yes / No
Have you donated money to a charitable organization within the past 12 months? Yes / No
Have you donated money to a charitable donation serving homeless individuals within the past year? Yes / No

PAGE BREAK

Please carefully read the following charitable appeal letter. As you go, please click to highlight the sentences that stand out to you. Which ones do you find most convincing?

[INSERT LETTER HERE]

PAGE BREAK

How did you feel while you were reading the letter? *(presented in random order)*
(1=very slightly or not at all, 5= extremely)

Disturbed, worried, moved, compassionate, upset, distressed, sympathetic, sad, caring, interested, attentive, jittery, nervous, inspired, irritable, hostile, happy

You read a charitable appeal letter for a real nonprofit organization, the Dayspring Center in Indianapolis, Indiana. Have you heard of Dayspring Center before you participated today? Yes / No

As part of this study, all participants will be entered into a drawing for 1 of 6 prizes, worth $50 each. We will do the drawing after all participants have completed this study. You have a 1 in 60 chance of winning the drawing. Participants who win will receive the money as a bonus in MTURK.

If you win, how much of your $50 prize do you want to donate to Dayspring Center? You can donate any amount from $0 to $50, and we will honor your decision and make the donation anonymously on your behalf. We will post the donation receipt at this website at the end of the study: [INSERT LINK HERE]

I choose to give: ________
Therefore if I win, I will receive an MTURK bonus of: ________($50 minus the amount you chose to give)

**Note that we cannot provide a personal tax receipt for your donation, since it will be anonymous.

PAGE BREAK

We will now ask you a few background questions to better understand your responses.

Gender (allow for self-describe)
Age (categories)

Some participants read a fundraising letter written by a single person, but other participants read a letter written by a team of two fundraisers. Which do you think you read? Please try to guess, even if you don't know.
My letter was written by a single person
My letter was written by a team of two

Check any types of involvement with homeless-serving organizations in the past 2 years:
Worked (for pay)
Made a charitable donation (money or donated goods)
Volunteered time (unpaid)

Homeless means without permanent housing. Homeless people may live on the streets, stay in shelters, abandoned buildings, or vehicles, or may have other temporary arrangements like living with friends. Have you ever been homeless?

Has any close friend or relative ever been homeless?

The statements below are reasons that people may or may not want to donate money to charitable organizations. Using the scale below, please indicate how much you agree or disagree with each of these statements in terms of how much it applies to you personally. Please answer these questions <u>whether or not</u> you actually donate to charities.

1	2	3	4	5
strongly disagree	moderately disagree	neither agree nor disagree	moderately agree	strongly agree

_____ 1. I donate because I feel compassion toward people in need.
_____ 2. I donate because I receive a tax credit for charitable contributions.
_____ 3. Many charitable organizations are dishonest.
_____ 4. Others with whom I am close place a high value on donating to charities.
_____ 5. Donating to charity helps me save on my income taxes.
_____ 6. Donating money to charities would interfere with me meeting my own financial obligations.
_____ 7. People should be willing to help others who are less fortunate.
_____ 8. Much of the money donated to charities is wasted.
_____ 9. Giving money to charities enables me to reduce my income taxes.
_____ 10. People I know share an interest in financially supporting charitable organizations
_____ 11. My image of charitable organizations is positive.
_____ 12. Giving to charities makes me feel powerful.
_____ 13. Donating money to charities provides too much of a financial strain on me.
_____ 14. My friends donate to charities.
_____ 15. Contributing money to charities enables me to obtain recognition.
_____ 16. I donate money to charities because it makes me feel needed.
_____ 17. Even if I wanted to donate money to charities, I could not financially afford it.
_____ 18. I give because I am concerned about those less fortunate than myself.

To what extent does the following statement describe you: "I am an empathetic person," 1=Not very true of me to 5=Very true of me.

Are there any other reasons that you give (or would give) to charitable organizations? ___________________________

PAGE BREAK

Thank you for completing the study. In order for you to receive a payment, you will need to make up a unique code (set of letters and numbers) here, and then copy and paste it in the MTURK box before you submit it. That way, we will be able to match your survey responses to your MTURK ID for payment.

Codes must be unique (not 123456), and at least 6 characters long. We suggest a code as follows:
The initials of someone you love + a number between 100 and 1000 + the first 3 letters of a street in your city
e.g. JRK839ALA (do not use this example!)

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Tajfel, H., & Turner, J. C. (1986). The social identity theory of inter group behaviour. In S. Worchel & W. Austin (Eds.), *Psychology of intergroup relations*.

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Turner, J. C., & Oakes, P. J. (1986). The significance of the social identity concept for social psychology with reference to individualism, interactionism and social influence. *British Journal of Social Psychology*, *25*, 237–252. https://doi.org/10.1111/j.2044-8309.1986.tb00732.x

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van Teunenbroek, C., Bekkers, R., & Beersma, B. (2020). Look to others before you leap: A systematic literature review of social information effects on donation amounts. *Nonprofit and Voluntary Sector Quarterly*, *49*(1), 53–73.

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Warwick, M. (2010). *How to write successful fundraising letters* (Vol. 2). John Wiley & Sons.

Weber, J. M., Kopelman, S., & Messick, D. M. (2004). A conceptual review of decision making in social dilemmas: Applying a logic of appropriateness. *Personality and Social Psychology Review*, *8*(3), 281–307. https://doi.org/10.1207/s15327957pspr0803_4

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Williams, D. K. (2015). *Defenders of the unborn: The pro-life movement before Roe v. Wade*. Oxford University Press.

Yin, R. K. (2013). Validity and generalization in future case study evaluations. *Evaluation*, *19*(3), 321–332.

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Zagefka, H., Noor, M., Brown, R., Hopthrow, T., & de Moura, G. R. (2012). Eliciting donations to disaster victims: Psychological considerations: Donations to disaster victims. *Asian Journal of Social Psychology*, *15*(4), 221–230. https://doi.org/10.1111/j.1467-839X.2012.01378.x

Zhou, M., Lu, B., Fan, W., & Wang, G. A. (2018). Project description and crowdfunding success: An exploratory study. *Information Systems Frontiers*, *20*(2), 259–274. https://doi.org/10.1007/s10796-016-9723-1

Zhu, X., & Knoke, D. (2010). Community philanthropy. In H. K. Anheier & S. Toepler (Eds.), *International encyclopedia of civil society* (pp. 533–539). Springer. https://doi.org/10.1007/978-0-387-93996-4_541

Zunz, O. (2014). *Philanthropy in America: A history*. Princeton University Press.

CURRICULUM VITAE
Heather Ann O'Connor

EDUCATION

Indiana University
Ph.D. in Philanthropic Studies, Lilly Family School of Philanthropy, 2021
Dissertation: *Reading Between the Lines: Social Contextual Influences on the Production of and Response to Charitable Appeals.*

The University of Chicago
Master of Arts in Social Work, School of Social Service Administration, 2005

University of Tennessee at Knoxville
Bachelor of Science in Public Relations, School of Communications, 1999

REFEREED JOURNAL ARTICLES

Mesch, D., Osili, U., Dale, E., Ackerman, J., & **O'Connor, H**. (2021). Charitable giving in married couples: Untangling the effects of education and income on spouses' giving. *Nonprofit and Voluntary Sector Quarterly*.

Dale, E., & **O'Connor, H.** (2020). The million dollar donor journey: Stages of development for women donors. *International Journal of Nonprofit and Voluntary Sector Marketing*, *26*(1).

O'Connor, H. (2020). Mindfulness as a foundation for reflection: Applying principles from dialectical behavior training to service-learning instruction. *Journal of Nonprofit Education and Leadership*, *10*(2).

REFEREED BOOK CHAPTERS

O'Connor, H. (in press). Writing compelling appeals. In G. Genevieve, S. Nathan, E. Tempel, & W. Stanczykiewicz (Eds.), *Achieving excellence in fundraising* (5th ed.). John Wiley & Sons.

Dale, E., Shaker, G., & **O'Connor, H.** (2020). Teaching philanthropy: Developing critical and compassionate approaches to giving. In K. Bezboruah, & H. Carpenter (Eds.), *Teaching nonprofit management*. Edward Elgar Publishing.

REPORTS, WHITE PAPERS, & INDUSTRY PUBLICATIONS

Nathan, S., **O'Connor, H.,** Shaker, G., & Danahey-Janin, P. (2021). Fundraisers at small nonprofits need more support. Peer mentoring is an easy, low-cost answer. *The Chronicle of Philanthropy.*

Nathan, S., & **O'Connor, H.** (2019). Perspectives on an old narrative about the fundraising profession [invited blog post]. *Fresh perspectives from the world of philanthropy*.

Dale, E., **O'Connor, H.**, Small, D., Mesch, D., Osili, U., & Ackerman, J. (2018). *Giving by and for women: Understanding high-net-worth donors' support for women and girls*. Women's Philanthropy Institute, Indiana University.

Osili, U., Mesch, D., Ackerman, J., Pactor, A., & **O'Connor, H.** (2018). *How women and men give around retirement*. Women's Philanthropy Institute, Indiana University.

Austin, T., & **O'Connor, H.** (2017). Giving to religion. In *Giving USA 2017: The annual report on philanthropy for the year 2016* (pp. 171–193). Giving USA Foundation.

O'Connor, H. (2016). Giving to human services. In *Giving USA 2016: The annual report on philanthropy for the year 2015* (pp. 183–200). Giving USA Foundation.

BOOK REVIEWS

O'Connor, H. (2019). [Rev. of Goldseker, S., & Moody, M. (2017). *Generation impact: How next gen donors are revolutionizing giving*.] *Nonprofit and Voluntary Sector Quarterly*, *48*(6).

O'Connor, H. (2008). [Rev. of Heath, C., & Heath. D. (2007). *Made to stick: Why some ideas survive and others die*.] *Perdido Magazine: Leadership with a Conscience*, *12*, 24–25.

CONFERENCE PRESENTATIONS

O'Connor, H. (2019). *For the cause: Exploring professional development and identity among fundraisers in rural Alaska*. Paper presentation, ARNOVA National Conference, San Diego, Nov. 21.

Nathan, S., Shaker, G., **O'Connor, H.**, & Danahey-Janin, P. (2018). *Breaking the isolation: Fundraisers, informal support groups, and professional growth*. Poster presentation, ARNOVA National Conference, Austin, Nov. 15–17.

Dale, E., & **O'Connor, H.** (2018). *Million-dollar gifts by and for women: A new model of philanthropy?* Paper presentation, ISTR International Conference, Amsterdam, July 12.

O'Connor, H., Konrath, S., Goodwin, J., & Austin, T. (2018). *Effects of teamwork on the fundraiser experience*. Paper presentation, ISTR International Conference, Amsterdam, July 10.

O'Connor, H., Austin, T., & Goodwin, J. (2017). *Are two heads better than one? Effects of working as a team vs. alone on fundraising effectiveness and fundraiser satisfaction*. Paper presentation, ARNOVA National Conference, Grand Rapids, Nov. 16.

O'Connor, H. (2015). *Professional development for nonprofit leaders in rural Alaska: Perceptions, access, utilization, and needs*. Paper presentation, ARNOVA National Conference, Chicago, Nov. 19.

TEACHING & CURRICULA DEVELOPMENT

Part-Time Instructor, 2020–2021
Adjunct Faculty Member, 2018–Present
Principles and Techniques of Fundraising (in-person, four days), 2018, 2019
Fundraising for Small Nonprofits (asynchronous online, three weeks), 2020

Curriculum Developer/Doctoral Graduate Assistant, 2019–2020
The Fund Raising School, Indiana University Lilly Family School of Philanthropy
Developed professional development workshops for third sector leaders:
Understanding Philanthropy (blended, two days)
Developed course developed for new Certificate in Philanthropic Leadership
Strategic Planning for Nonprofits (synchronous online, one day)
Customized seminar for a national organization

Instructor, 2018–2020
Indiana University Lilly Family School of Philanthropy
Philanthropic Studies 558: Principles and Practices of Fundraising (graduate)
Summer 2020 (asynchronous online, 16 weeks)
Fall 2019 (asynchronous online, 16 weeks)
Philanthropic Studies 105: Giving and Volunteering in America (undergraduate)
Incorporated service-learning and other high-impact, evidence-based practices within a themed learning community of 25 students.
Summer 2019 (asynchronous online, 8 weeks)
Spring 2019 (blended course, 16 weeks)
Fall 2018 (blended course, 16 weeks)

Doctoral Graduate Assistant, 2016–2017
Indiana University Lilly Family School of Philanthropy
Assisted in the development of two new Certificates in Philanthropic Fundraising at the graduate and undergraduate levels. Researched and drafted program proposals; developed syllabi, created course outlines and assignments for four courses:
Institutional Donor Dynamics (undergraduate, in-person, 16 weeks)
Individual Donor Motivations and Engagement (undergraduate, in-person, 16 weeks)
Donor Behavior in Major and Planned Giving (graduate, asynchronous online, 16 weeks)
Institutional Donors (graduate, asynchronous online, 16 weeks)

Adjunct Faculty, 2013–2015
Kenai Peninsula College, University of Alaska Anchorage
Developed and taught Introduction to Grant Proposal Writing. Professional development course for adult learners (in-person, one-day course offered each fall).

RESEARCH EXPERIENCE

Doctoral Research Assistant, Women's Philanthropy Institute (WPI)
Indiana University Lilly Family School of Philanthropy, 2017–2019
Assisted with quantitative and qualitative research on gender differences in giving around retirement and understanding high-net-worth donors' support for women and girls. Tasks included literature reviews, survey preparation, and drafting white papers.

NONPROFIT LEADERSHIP EXPERIENCE

Executive Director
Kachemak Bay Family Planning Clinic, 2012–2016 (Homer, Alaska)

Vice President, Development
Dental Lifeline Network, 2010–2012 (Denver, Colorado)

Major Gift Officer
Samaritan Health Services, 2008–2010 (Corvallis and Newport, Oregon)

Director of Development and Communications
Lakeview Pantry, 2007–2008 (Chicago, Illinois)

Assistant Director, Leadership Giving and Assistant Director, Donor Relations
The University of Chicago, 2005–2007 (Chicago, Illinois)

Development Associate
Trinity Services, Inc., 2002–2005 (Joliet, Illinois)

Account Representative
Summit Consulting Group, Inc., 1999–2002 (Chicago, Illinois)

ADDITIONAL TRAINING & CERTIFICATION

Chartered Advisor in Philanthropy (CAP) designation
The American College of Financial Services, 2020

Certificate in College Teaching
Indiana University Center for Teaching and Learning, 2019

Grounded Theory Workshop
Indiana University Center for Professional Development and Lifelong Learning, 2018

The Collaborative Institutional Training Initiative (CITI)
Human Subjects Research series, 2015, 2017, 2019

Certificate in Fundraising Management
The Fund Raising School, Indiana University Lilly Family School of Philanthropy, 2008

Certified Fundraising Executive
CFRE International, 2008

GRANTS, FELLOWSHIPS, & AWARDS

Fellow, Women's Philanthropy Institute (WPI), Lilly Family School of Philanthropy at Indiana University, 2020 ($5,000)
Emerging Scholar Award. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2019
Debra Mesch Doctoral Fellowship for Research in Women's Philanthropy. The Lilly Family School of Philanthropy at Indiana University, 2019
Teaching Award for Doctoral Students. The Lilly Family School of Philanthropy at Indiana University, 2019 ($500)
Ernest W. Wood Fellowship. The Lilly Family School of Philanthropy at Indiana University (in partnership with AFP Foundation for Philanthropy), 2017, 2018, 2020
Ph.D. Seminar, 13th International Conference in Amsterdam. International Society for Third-Sector Research (ISTR), 2018
Nominee, Sherry Queener Graduate Student Excellence Award. Indiana University Purdue University Indianapolis (IUPUI), 2018
Travel Support Award. 13th International Conference in Amsterdam, International Society for Third-Sector Research (ISTR), 2018 ($100)
Graduate and Professional Education Grant. Indiana University Purdue University Indianapolis, 2018 ($500)
Nancy Macduff Scholarship. Pracademics Section, Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2017 ($300)
Graduate Student Research Grant. Lilly Family School of Philanthropy at Indiana University, 2017 ($3,200)
David H. Jacobs Fellowship. The Lilly Family School of Philanthropy at Indiana University, 2016
Conference Scholarship and Travel Grant. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2015 ($250)
The Kresge Foundation Executive Masters Scholarship. The Lilly Family School of Philanthropy at Indiana University, 2015
Professional Development Scholarship. Association of Fundraising Professionals (AFP) Alaska Chapter, 2014 ($300)
Professional Development Scholarship. Association of Fundraising Professionals (AFP) Chicago Chapter, 2008 ($300)
Dottie Rosso Scholarship Fund. The Fund Raising School (TFRS). Indiana University. 2008 ($500)

International Conference Travel Award, Association of Fundraising Professionals (AFP) Chicago Chapter, 2007 ($300)
School of Social Service Administration Scholarship Award. The University of Chicago, 2003, 2004

UNIVERSITY & DEPARTMENTAL SERVICE

The Lilly Family School of Philanthropy at Indiana University

Invited judge, Behavioral Experiments in Philanthropy (P-630) graduate student competition, 2018, 2020
Member, Tim Seiler Scholarship Selection Committee, The Fund Raising School, 2019–2020
Member, Professional Doctoral Degree Task Force, 2018–2020
Member, Academic Programs Committee, 2017–2019
Mentor, Undergraduate Service Learning Assistant Program, 2018–2019

The University of Chicago School of Social Service Administration

Member, Professional Development Committee, 2005–2010

SERVICE TO PROFESSION

Committees and Conferences

Panel Organizer, "Message Strategies in Fundraising and Volunteer Recruitment." Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) Conference, 2020
Co-founder, Common Interest Group in Message Framing, ARNOVA, 2019–Present

Treasurer, Pracademics Section, ARNOVA, 2017–2019
Discussant, "Formalizing the Relationship Between Practitioners and Academics: Making the Data Connection." ARNOVA Conference, San Diego, 2019

Peer Review

International Journal of Nonprofit and Voluntary Sector Marketing
Journal of Nonprofit Education and Leadership (JNEL)
Nonprofit Management and Leadership (NML)
Nonprofit and Voluntary Sector Quarterly (NVSQ)
Voluntas: International Journal of Voluntary and Nonprofit Organizations

PROFESSIONAL AFFILIATIONS

Association of Fundraising Professionals (AFP)
Member, Peer Mentoring Committee, Chicago Chapter, 2006–2008
Member, 2005–Present

Academy of Management
Member, Public and Nonprofit Division, 2017–Present

Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)
Co-Founder, Message Framing Common Interest Group, 2019–Present
Treasurer, Pracademics Section, 2018–2020
Member, Pracademics Section, Early Scholars Section, 2013–Present

International Society for Third-Sector Research (ISTR)
Member, 2013–Present

International Association of Advisors in Philanthropy (AiP)
Member, 2020–Present

Purposeful Planning Institute (PPI)
Member, 2020–Present